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ABSTRACT

University of the Third Age (U3A) programs in Australia and New Zealand were examined through data collected from 126 U3A groups in Australia and 20 in New Zealand. The 24,870 responses and 2,002 responses obtained in Australia and New Zealand, respectively, represented 76% and 77% of U3A group members in the two countries. Data were collected about the following: nature and extent of voluntary activities within individual U3A groups; management issues (finances, external support, and teaching); and the future of U3As. U3As were determined to be extremely effective adult education organizations in Australia and New Zealand. With no coordination assistance and little formal external support or funding, U3As have grown rapidly in both countries. A number of tentative links between the cognitive challenges and social networks provided by U3As and well-being were explored, and the monetary value of the U3A movement in Australia and New Zealand was estimated to exceed $4 million annually. (Contains 29 references. Appended are 16 charts for Australia and New Zealand and lists of the following: former occupations of principal office bearers; methods used to actively recruit members; and groups participating in the study; and study questionnaire.) (MN)

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U3As in Australia and New Zealand:
Society's four million-dollar bonanza

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U3As in Australia and New Zealand:
Society's four million-dollar bonanza

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1 Background to the study

Throughout the twentieth century the average age of the population has steadily increased. Every developed country is currently experiencing a rapid rise in the number and proportion of people over the age of 60, with fastest growth amongst those over the age of 80. If anything, this trend is projected to increase throughout the next few decades (Brink, 1997).

In all developed countries population ageing has been accompanied by a decline in the proportion of people in the paid work force. Through taxation, paid workers have helped to fund the welfare programs on which many individuals, including some of the ageing, are reliant. It is no longer realistic to believe that a diminishing proportion of the population in work will be able to fund all the programs which will be needed to assist growing numbers of dependent individuals.

A by-product of current financial planning policy in developed countries has been a narrow focus on monetarist goals, which have begun to overwhelm considerations of social justice and equity. There is no longer enough money to adequately provide the kinds of safety net programs that formerly provided support for vulnerable individuals of all ages. A 1995 issue of the journal Ageing and Society was devoted to the theme of resource allocation and societal responses to old age, and many of the related but difficult options that are beginning to emerge. In the introduction to the issue Callahan, Ter Meulen and Topinkova (1995) observed that simply to maintain the level of services available in 1990 would entail an increase of 10 to 15 per cent in resources for home and institutional care. They described this as an intimidating figure in the face of public and political pressures to hold down, or cut back on, health and welfare spending in all countries.

The most likely foreseeable outcome of measures that many countries are now taking to curb national deficits is further erosion of budgets for social services programs and an increasing emphasis placed on fee-for-service schemes. Inevitably, these moves will be highly disruptive to established social programs and, certainly, damaging to the individuals whom the programs are designed to assist. However, an additional danger for society as a whole lies in the socially divisive slogans or alarmist reports which, frequently, are cited as justifications for limiting social services. Sheppard, Myles and Polivka (1996) have attacked the rhetoric of what they call apocalyptic gerontology, and the unexamined assumptions behind the tendency in the USA to blame the ageing for shortfalls in general social services budgets. In similar vein Walker (1990), and Minkler and Robertson (1991) have been highly critical of those who unintentionally foster the growth of intergenerational conflict. The thoughtless use of terms like the "burden" of ageing, the economic "burden" of pensions and the "burden" of health care costs are socially damaging because they convey an image that the ageing population is unfairly disadvantaging the rest of society.

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Uninformed rhetoric, which appears to blame the ageing, is both logically and factually foolish. Logically, it is foolish because, failing a catastrophic event, the very large majority of young adults will inevitably reach old age. It makes little sense for them to muddy the pool in which they will soon be swimming. A more logical way of thinking about problems associated with an ageing society would be to start from the premise that we are all in this together so we should consider issues such as fair and equitable resource allocation from a whole-of-life perspective.

Factually, implications that the ageing in general are a burden on the health care system, are incorrect. Although most people in society believe the ageing are heavily dependent on welfare services, this is not the case. Ninety per cent of people aged 60-70 years old require no assistance whatsoever and 40% of people aged 80 years and older succeed in coping with everyday life without the slightest assistance (World Health Organisation, 1990). Moreover, longitudinal studies show that levels of chronic disability and institutionalisation amongst the ageing in the United States have declined significantly in recent years, and the downward trend appears likely to continue (Maddox, 1995). Other developed countries may mirror this trend. Numerous studies also show that older people highly value their independence. For example, in one Australian study, Day (1985) carried out a series of in-depth interviews with people aged 75 years and older and found that person after person equated an age-related drift into dependency as a major threat to their personal identity and feelings of self-worth. These findings give lie to the myth that the ageing are a burden on the social services sector. However, despite the generally healthy nature of the ageing population and their very strong desire to retain their independence, the demand for acute and long-term services will increase in absolute terms (Maddox, 1995; Butler, 1996). This is because the population aged 80 years and older is predicted to increase rapidly and this is the group most in need of expensive, specialised support services.

Over the past few years a substantial movement in the general understanding of health has occurred, away from the traditional medical model which emphasises the diagnosis and treatment of disease, and towards healthy ageing. This considerably widened focus on the whole person has been driven by a greater understanding of the realities of ageing, and the diverse psycho-social factors which have been shown to influence well-being, including spiritual, economic, and social needs, as well as physical needs (Jones, 1992). The World Health Organisation's Health for All Campaign sees social health as encompassing:

- safe environments;
- the basic necessities of life (adequate food and shelter);
- the basic amenities of life (transportation, recreation, beauty, stimulation);
- safe, rewarding and meaningful work; and
- companionship and involvement.

Clearly, the international focus of health has shifted towards well-being. The message would now seem to be that it is preferable to provide opportunities which enable the myriad groups who comprise "the ageing" to maximise their own well-being. It is socially preferable, and certainly much cheaper than total care, to provide the kinds of support which maximise opportunities for the ageing to maintain, as many of their activities of daily living as they can, for as long as they can. This focus on healthy ageing has led to research interest into the many factors that appear to influence health.

Emerging links between intellectual challenge and good health

One outcome of a situation in which increasing numbers of people are in competition for fewer resources is that greater emphasis may be placed on the funding of programs which encourage healthy individuals to take steps to maximise their own well-being. For example, a number of recent studies suggest that older individuals may be able to improve, or at least maintain, aspects of their health through intellectual stimulation. Langer (1989) is an advocate of this position. In summarising the pool of evidence which appears to support her view, Langer was moved to '...make the strong claim that the body begins to die as the mind ceases to deal with novelty' (p. 142). More recently, in reviewing evidence which indicates that education may protect against dementia, Orrell and Sahakian (1995) suggested that adult education programs and stimulating mental activity may help in the development of coping skills and strategies for solving problems. In turn these may help to offset the cognitive affects of normal ageing and delay the clinical symptoms associated with diseases such as Alzheimer's. If this is true, the finding would be of significant economic importance. Katzman (1995) observed that the economic cost of caring for demented older persons in the United States is over 100 billion dollars a year and that merely by introducing a 5-year delay in the onset of symptoms would halve the number of dementia patients. He suggested that the discovery of activities that delay the onset of dementia would likely have the same consequences as the discovery that diet and exercise delayed the onset of cardiovascular disease in older individuals. He further speculated that if engagement in specific social or leisure activities in later life is found to delay the onset of dementia, there would be a reasonable biological basis for this: rodents exposed to stimulating environments increased their levels of cognition and brain weight. Educational attainment may also be directly related to health in later life. Guralnik, Land, Blazer, Fillenbaum and Branch (1993) found that educational attainment has a strong influence on total life expectancy and active life expectancy among both blacks and whites. They described their finding as being of great importance 'because education level, and socioeconomic status in general, are alterable risk factors' (p. 115).

Additional to the possibility that a link exists between mental stimulation and late life health and well-being, a consistent inverse relationship between social support and mortality and morbidity (Cohen & Syme, 1985) has also been found, although, once again, the causal variables are not

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well understood.

These findings appear to mesh well with the objectives of groups which are concerned mainly with the provision of intellectually challenging activities in socially stimulating surroundings. In the past 25 years or so, in response to the rapidly growing numbers of healthy, active people who have entered their Third Age, a rapid proliferation has taken place in the number of high quality educational programs designed specifically to meet the needs of older people (Swindell & Thompson, 1995). Case studies and descriptions of some of these have appeared in adult education literature with increasing frequency during recent years. For example, Knox (1993) provided details of a number of relatively new educational programs for older adults that have developed in different countries. Similarly, as part of a review of a recent major participation study of later life adult education in the USA, Manheimer and Moskow-McKenzie (1995) reported on the characteristics of diverse approaches which have evolved in that country.

The most obvious attribute of the majority of recently developed programs providing late life cognitive challenge is that they appear to have demolished most of the barriers which had proven in earlier years to be such strong deterrents to later life participation (Courtenay, 1989). In many cases the most successful new programs are community-based, thereby overcoming institutional barriers like inflexible timetables, unsuitable offerings, difficult locations, inappropriate teaching methods, and so forth. A relatively small number are run from traditional educational establishments like colleges and universities, but the majority are run from senior centres, churches, public halls, department stores or even participants' or tutors' homes. Locations are accessible by public transport, timetables are flexible and educational prerequisites and exams are irrelevant. Most programs embrace the ideal of participant empowerment, and older learners' roles in the programs include teaching, planning, governance, community service and research. The former Achilles-heel of so many adult education enterprises, namely cost, is not a deterrent because teaching and administration are carried out mainly by older volunteers. Of these programs, perhaps the best known and, arguably, one which has the greatest potential for meeting the educational, self-actualisation and emancipatory requirements of those in their Third Age, is the University of the Third Age (U3A).

Two differing U3A philosophies

Two quite different philosophies underpin the U3A ideal of providing intellectually challenging activities for older people. The original French model, which has been adopted by many countries, is heavily dependent on the goodwill and expertise of traditional universities. In contrast, the British or self-help approach, which also has been adopted by many countries, including some in which the French model also exists, relies entirely on the expertise of unpaid Third Age member tutors and administrators. In the self-help approach, association with traditional tertiary institutions is often missing or is incidental to the local

organisation's operations. Which of these two approaches is adopted by a particular region or country appears to depend on a variety of circumstances including the philosophical position of program founders, economic circumstances, and the likelihood of assistance from tertiary education institutions sympathetic to the U3A ideal.

The French model, which started in 1973, involves a strong relationship between traditional universities and retired people in the community. Courses vary widely in content, style of presentation and format. In general they exhibit a mixture of open lectures, negotiated access to established university courses, contracted courses, study groups, workshops, excursions and physical health programs. Content is mainly in the humanities and arts. Funding also varies considerably. Some U3As are largely university funded; some are funded by a combination of fees, donations, and direct financial subsidy from the local township; and some are mainly member-funded on a sliding scale, depending on participants' assets.

Perhaps reflecting difficult economic circumstances over the last decade, greater numbers of U3As that follow the French model are now placing more of the onus on participants to pay for courses and facilities. Today, even in France, many U3A classes have considerably broadened their student base to include housewives, the unemployed, public servants, and younger people including university students. In some cases the former U3As have been renamed as Leisure Universities, Free Time Universities, or Inter-Ages Universities to reflect the broader community focus which many universities are now adopting. In turn, this is leading former U3As to change the curriculum from an emphasis on learning for pleasure towards learning new work skills (Swindell & Thompson, 1995). The decline in support by universities for U3As is still evident. In her November/December 1997 lecture tour of Australia and NZ, Jean Thompson indicated that in many parts of continental Europe, where universities have traditionally provided space for U3As, U3As are being "edged out".

U3A underwent a substantial change when it reached Cambridge in 1981. Rather than relying on university good will the founders of the British model adopted an approach in which there was to be no distinction between the teachers and the taught (Laslett, 1989). Members would become the teachers as well as the learners. The "self-help" ideal was based on the knowledge that experts of every kind retire, thus, there should be no need for older learners to have to rely on Second Age teachers, whether paid or unpaid.

The self-help approach has been highly successful in many countries, including parts of Europe where the French model also operates. Some of the strengths of the approach include: minimal membership fees; accessible classes run from community halls, libraries, private homes, schools, and so forth; flexible timetables and negotiable curriculum and teaching styles; wide course variety ranging from the highly academic to arts, crafts and physical activity; no academic constraints such as entrance requirements or examinations; and, the opportunity to mix with

alert like-minded people who enjoy doing new things. Each U3A is independent and is run by a democratically elected management committee of members. Features of the French model are also present in the self-help model; the major differences are the lack of involvement by professional educators and a greater flexibility in the way U3As operate within the community.

For growing numbers of people in their Third Age, participation in cognitively challenging activities is an important component of their leisure-time activities. The perceived and actual benefits of participation in these kinds of programs are largely unknown. However, regardless of whether the link between late life cognitive challenge and good health can be firmly established, education has a number of obvious attributes that are likely to advantage participants. Most notably, cognitively alert individuals are more likely to develop a range of options for satisfying their own special needs than those who give up trying. Earlier it was pointed out that budgets for social services are likely to face growing pressure and that new approaches must evolve which provide opportunities for older people to maximise their well-being, but without relying heavily on the public purse. For policy makers concerned with the fair and equitable distribution of declining resources, the newer approaches to emancipatory, later life adult education may offer pointers to the kinds of low cost group activity which might be promoted to help foster the well-being of large numbers of older people.

Of the two U3A models the self-help approach would appear to offer greater opportunities for personal fulfilment. The greatest strength of the self-help model is its reliance on the expertise of its members for both course provision and administration. These U3A volunteers are engaged in what they regard as rewarding and meaningful work, and rewarding and meaningful work are attributes which were outlined earlier as being important components of the new model of social health. In contrast, late life adult education programs run by Second Age educators would seem to offer fewer opportunities for continued personal development by older volunteers.

U3As in Australasia

The first U3A campus in Australia began in Melbourne in 1984. In New Zealand, the movement took root in Auckland in 1989. Since then, quite rapid growth has occurred in both countries, as shown in Table 1 (Swindell & Vassella, 1997).

TABLE 1

Australia and NZ U3A membership growth 1995-1997

Australia	1995	1996	1997	Growth past year	% growth past year
No. of U3A groups	108	114	119	5	4.4
Total Membership	26346	31081	32757	2331	7.5
New Zealand	**1995**	**1996**	**1997**	**Growth past year**	**% growth past year**
No. of U3A groups	15	16	20	4	25
Total Membership	1682	1957	2601	644	32.9

Australia. U3As in Australia provide a wide variety of intellectually demanding courses, crafts, field trips and social activities for older adults. By early 1997, 119 independent campuses were operating in all States and Territories, providing activities for nearly 33,000 members. This growth has taken place with no centralised coordination, and little or no support from government, funding agencies or Second Age educators. The movement has been almost entirely grassroots driven at the local level. The few U3As which are associated with universities or colleges are fully self-governing, with university input being largely of a facilitative nature. Apart from a few notable exceptions organised communications between the U3As are limited. Although a number of well organised State and regional networks exist, many individual U3As have been strongly resistant to the idea of a national organisation similar to those operating so successfully in other countries, such as the UK and the USA. In light of the lack of communication between most U3As it seems somewhat surprising that the U3A approach has been so uniform and so successful across Australia's very large land mass (about the same area as the USA). McDonell (1991) attributed the uniformity of development of the independent U3As in Australia to a combination of economic and political constraints that would have seriously hindered attempts to develop anything other than a self-help approach. According to McDonell, discussions about possible U3A developments in Australia in the early 1980s coincided with the release of a policy paper by the Federal Government expressing concern that the rapidly increasing number of mature age students in higher education should not be at the expense of enrolments by young people when demand for places exceeded supply. Thus, there appeared to be no alternative for U3A other than to go it alone. Table 1 indicates that going it alone, without financial support or coordination, has been no obstacle to development.

New Zealand. The first U3A group was established in Auckland in 1989. Since then it has spread rapidly throughout most of the country, with greater growth in the more highly populated North Island. Membership

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numbers have recently increased rapidly, reflecting growing understanding of the U3A ideal throughout the country and its acceptance in smaller cities and towns. By early 1997, 20 groups were providing courses for 2600 members. Each group is independent and is modelled on the UK self-help approach. A regional network in the Auckland area links the rapidly growing U3A movement in that region. A network in the Wellington area is reported to be under consideration. For the most part groups prefer to remain quite small and, likely, they would split into smaller units in preference to growing into the very large groups found in parts of Australia. By remaining small U3A leaders suggest that they can more quickly respond to the needs of the local community as well as providing a more personal service. Although the courses are basically educational, the great majority are run in private homes so groups tend to be small and friendly, and participants get to know each other well. About 15 appears to be the preferred class size. Some of the more popular classes may attract 20 or more, however, not many homes can accommodate such large groups in comfort. The study program is flexible and covers a wide variety of teaching and learning styles and preferences. Some courses are academically quite demanding, others are more of a recreational nature. In addition to the regular academic program many groups hold monthly general meetings in suitable halls, and these often feature an invited speaker. The group meetings are popular and well attended, and help build a sense of belonging to a diverse and growing organisation. A number of groups prefer not to have designated tutors but attempt to get everyone to take at least a minor course leadership role.

Aims of the study

Wider society's poor understanding of the realities of the Third Age was briefly alluded to earlier. By and large the ageing tend to be seen as a passive, needy and dependent group who are takers and recipients of pensions and welfare services. Rarely are they thought of as givers and helpers despite the fact that many older volunteers contribute significantly to health, welfare and education systems, as well as to community and social affairs (Jones, 1992; Nicholls, 1996). Indeed, so widespread is voluntarism that a 1997 United Nations sponsored conference recommended that

> volunteerism [sic] should be developed as a worldwide concept, thereby providing a structure for older persons to contribute acquired lifelong experience to others. The value of volunteer work should be measured and included as part of the national economy. (Living longer..., 1997, p. 5).

Part of the reason for society's persistent, archaic, ageist and socially inappropriate views of life after retirement is the lack of hard data about the nature and extent of third agers' contributions to society. Such data are needed to reverse stereotypical thinking, and to rebut the damaging generalisations made by public figures who should know better, that the ageing are to blame for a growing inability to balance social welfare budgets.

One of the principal aims of this study is to provide U3A members with detailed population-wide data about their organisation. These data may be useful in a number of ways, perhaps by providing individual U3As with information to develop a case for the donation of resources that would help them to better meet the needs of a rapidly growing membership. On a wider scale the data might be used to help overcome ageist misconceptions. For example, many U3A members are politically well connected; many have established good links with the media; and many speak at meetings and public forums attended by decision-makers in society. U3A members who adopt a public profile are in a position to influence social change of a kind that will benefit not only the wider Third Age population, but also the population at large.

In these cost-benefit focused times a strategy which would almost certainly cause many second agers to sit up and take notice of retired people's contributions to society, would be to publicise the monetary value of their contributions. Instead of modestly attempting to let the record of voluntarism speak for itself (which it is obviously not doing) an actual dollar figure should be ascribed to the work that Third Age volunteers donate to many sectors of the community. This is one of the approaches taken in this report, and one that has given rise to the provocative title of the report.

Questionnaire Development

The survey concentrated on three main areas, namely:

- The nature and extent of voluntary activities within individual U3A groups. These data were used to calculate a notional financial worth of U3A voluntarism;
- Management issues such as finances, external support, teaching etc; and,
- Future visions. Ideas for this section came from topical and sometimes contentious issues that had been raised at various U3A conferences, and from emerging social directions that may influence future U3A activities.

Pilot testing

Table 2 lists names of colleagues from Australia, New Zealand, the UK and the USA who tested the questionnaire and provided critical comment on structure and content as well as suggestions for additional items. Their helpful ideas are gratefully acknowledged.

TABLE 2

Evaluators and pilot testers of the draft questionnaire

Dorothy Braxton	U3A ACT
Cecily & Neville Butcher	Orange U3A
Colin Climie	U3A Takapuna
Fergus Ferguson	U3A Ohariu
Ray Gall	Shoalhaven Third Age of Learning
Norman Knight	Sydney U3A
Colin Lawton	U3A -SA (Adelaide Branch)
Ron Manheimer	University of North Carolina
Jack McDonell	U3A Network Victoria
June Morris	Brisbane U3A
Wyn Rahilly	U3A Sunshine Coast
Carol Sanders	U3A Auckland Network
John Stewart	U3A Remuera
Jean Thompson	UK U3A representative to AIUTA

Response rates

The questionnaire (Appendix 4), a covering letter and reply paid envelope were sent to the 119 Australian U3A groups listed in the 1997 U3A Directory for Australia and New Zealand, and to the 8 groups comprising the Sydney U3A Network. A similar request was sent to the 20 NZ U3A groups but without the reply paid envelope. The high initial response rates shown in Table 3 (Australia 67%; NZ 70%) made it unnecessary to send out a reminder. Also shown in Table 3 are the recorded U3A memberships for each country and the total membership represented by the responding groups. These data are used later in Section IV calculations that ascribe a dollar value to U3A voluntarism.

TABLE 3

Response rates by country

	Australia	NZ
Number of U3As surveyed	126	20
Total membership	32,757	2,601
Response rate	84 (67%)	14 (70%)
Represented membership	24,870 (76%)	2,002 (77%)

A list of participating groups is given in Appendix 3.

Data Analysis

Numerical data were recorded directly into an Excel spreadsheet. Non-numerical data were grouped into categories having similar characteristics and assigned a numerical code. These codes were also entered into Excel for analysis. Most of the descriptive statistics and charts were produced using Excel statistical functions. Other statistical calculations and some charts were produced using SPSS version 7.5 for Windows.

Not all participating groups answered every question. Groups providing incomplete data were excluded only from the analysis of those specific items. The number of groups providing data for a particular item is shown (n =) in relevant tables or charts.

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III Nature and extent of voluntary activities within U3A groups

Teaching year

Table 4 shows the average teaching year in weeks for Australia and NZ groups.

TABLE 4

Duration of teaching year

	Average (weeks)	Range (weeks)
Australia (n=76)	38	10-48
NZ (n=14)	40	33-44

In general, the U3A teaching year is divided into terms that mirror local school terms. Some of the smaller groups choose to hold mass meetings regularly throughout the year for example, twice a month over nine or ten consecutive months. The average teaching year in Australia is about 38 weeks. However, the range is quite wide with 7 groups offering activities for 29 or fewer weeks annually, and two groups providing a very long teaching year of 48 weeks. Nearly 60% of Australian groups run a teaching year of between 40 and 44 weeks. The average teaching year in NZ is 40 weeks with a much smaller range (33-44 weeks) than found in Australia. The most frequently cited teaching year (mode) for both countries was 40 weeks. More detailed information about the teaching year can be found in the charts shown in Appendix 1

Teaching

The volunteers who run U3A courses are referred to by a variety of names including teachers, convenors, tutors, facilitators, coordinators and so forth. In this report the term tutor will be used to refer to any U3A member who organises and/or runs a U3A course. Many U3A groups have specialist courses run by non-U3A member tutors but their contributions are not included in the following analysis.

Totals teaching hours for each U3A were calculated from the following details, which were provided by responding groups:

1. duration of teaching year in weeks;
2. average number of courses run during a typical teaching week; and

3. number of hours of teaching during a typical teaching week.

As an aid to understanding how these data were used consider the details for a hypothetical U3A shown in Table 5.

TABLE 5

Teaching hours for a hypothetical U3A group

1. Duration of teaching year	40 weeks
2. Average number of courses per week	13 courses
3. Hours taught per week	19 hours
Total teaching hours per year	760 hours

Rows 1 and 2 are self-explanatory. Row 3 information was calculated by adding the total teaching hours offered each week. In this hypothetical example, 8 of the 13 courses may have run for 1 hour; 4 for 2 hours; and 1 for 3 hours, giving a total of 19 teaching hours per week. Total teaching hours recorded in the bottom right cell were obtained by multiplying rows 1 and 3 to give a total of 760 person hours of teaching per year.

Similar calculations were run for each of the 80 Australian and 14 NZ groups. The totals for each country are shown in Row 1 of Tables 6a and 6b.

TABLE 6A

Total teaching hours by U3A member tutors in Australian U3As

	Hours
1 Weekly courses (80 U3A groups)	103,331
2 Occasional courses (53 U3A groups)	3,536
3 Total teaching hours	106,867
4 Estimated teaching & preparation hours	**213,734**

TABLE 6B

Total teaching hours by U3A member tutors in NZ U3As

	Hours
1 Weekly courses (14 U3A groups)	9,495
2 Occasional courses (7 U3A groups)	584
3 Total teaching hours	**10,079**
4 Estimated teaching & preparation hours	**20,158**

In addition to regular courses run during the U3A year many groups also run occasional courses such as botany excursions, historical visits, dance lessons and so forth. If member tutors rather than external tutors ran these, U3As were asked to itemise each of the occasional activities and to estimate an annual tutor hour commitment. Hours for these occasional activities are shown in row 2 of Tables 6a and 6b.

Row 3 of Tables 6a and 6b is the total hourly teaching involvement and was obtained by adding rows 1 and 2.

Teaching requires considerable preparation time; indeed, some U3A tutors report spending 4 or more hours preparing for each hour of actual teaching. It was not possible in this survey to ask tutors for an estimate of their preparation time. Instead, a very conservative figure of 1 hour of preparation for every hour of face-to-face teaching has been estimated and this figure is reflected in the row 4 total, which was obtained by doubling the row 3 total.

Management

The number of courses on offer in any week is a matter of record within each U3A, therefore total teaching hours as calculated in Tables 6a and 6b are likely to be quite accurate. In contrast, the variety of administrative tasks and time committed to each task are not a matter of record. To assist respondents to quantify the many administrative tasks participants were asked to fill out a number of tables that would allow an hourly estimate to be made of specific tasks. For example, a hypothetical U3A group that held 8 Management Committee meetings a year, each lasting 2 hours on average and having with 6 members on the committee, would have entered these numbers on the questionnaire as follows.

TABLE 7

Hypothetical Management Committee Meetings

Number of meetings per year	8
Average duration of meetings (hours)	2
Number of committee members	6

During analysis, these numbers were multiplied for each responding group, to give an hourly commitment to formal Management Committee meetings. For example, in the above hypothetical group, 96 person hours (8 x 2 x 6) were devoted to Management Committee meetings.

Similar pro formas were provided for, newsletter/publications committees, social committees, office staff activities and "any other" committees.

In many cases U3As do not operate with more than one formal committee. Instead, the majority of tasks such as finances, membership records,

publicity, tutor liaison and so forth, are carried out by individuals. To help quantify these activities respondents were asked to think about every administrative task carried out within their U3As, and to:

- provide a brief description of each task;
- estimate the number of person hours per week devoted to each task; and
- estimate the number of weeks per year devoted to the task.

Clearly, this kind of information is of a more qualitative nature than that obtained by counting tutor teaching hours (Table 6). Nevertheless, most U3A groups provided a comprehensive breakdown of administrative tasks and appeared to have little difficulty in ascribing a considered estimate of time committed to each. Tables 8A and 8B summarise these findings.

TABLE 8A

Total administration hours Australian U3As (n=83)

Activity	Number of groups	Total person hours
1 Management Committee	83	18,184
2 Social Committee	20	629
3 Newsletter Committee	34	1,345
4 Other Committees	30	5,728
5 Staffing office	30	44,136
6 Other administration tasks	77	60,506
Total hours		130,478

TABLE 8B

Total administration hours NZ U3As (n=14)

Activity	Number of groups	Total person hours
1 Management Committee	14	1,893
2 Social Committee	2	30
3 Newsletter Committee	5	178
4 Other Committees	2	48
5 Staffing office	2	13
6 Other administration tasks	12	4,464
Total hours		6,626

All responding groups are managed by elected management committees.

In other administration areas Australian U3As tended to operate with more committees than their NZ counterparts. This difference possibly reflects the emphasis that many NZ and some Australian U3As place on keeping their groups small. Rather than allowing growth to exceed approximately 200 members many NZ U3A groups would prefer to start another group. In contrast, many Australian U3As do not limit group growth. Group size is discussed later in this report.

Charts 1A and 1B summarise the contributions made by volunteer tutors and administrators.

Chart 1A: Voluntarism in the Australian sample

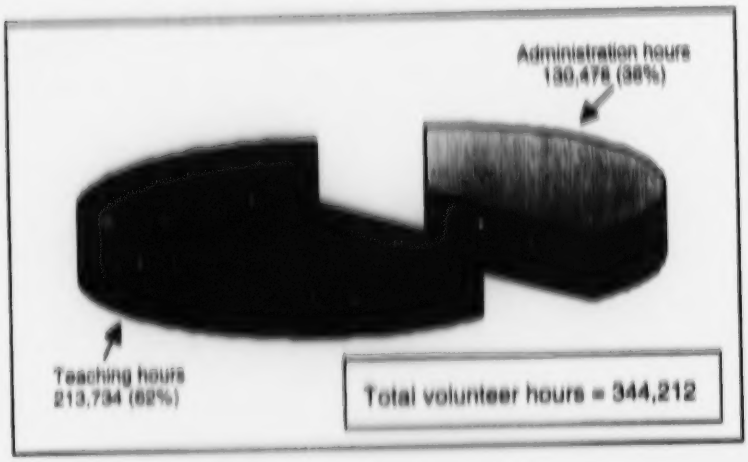
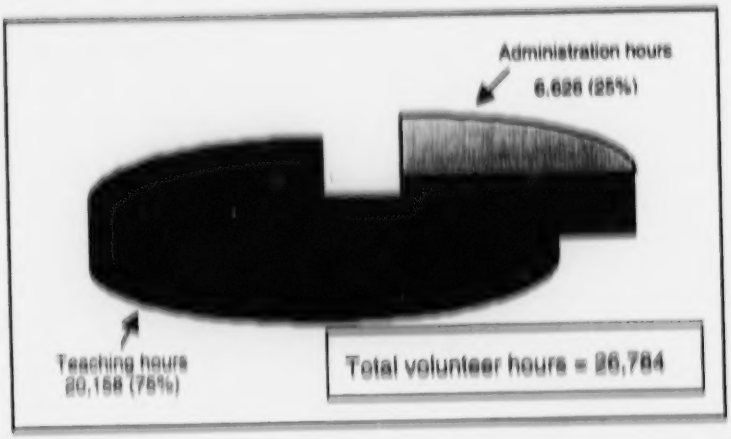


Chart 1B: Voluntarism in the NZ sample



The most notable characteristic of the self-help U3A model is the major contribution made by unpaid tutor volunteers, the great majority of whom are drawn from the membership. In some instances volunteers from outside the organisation provide specialist teaching and support. These outside contributions are both important and valued but they have not been counted in this analysis. As shown in the above charts member tutors provide 75% of the total voluntary contribution to NZ U3As, and 62% to Australian U3As.

An important difference in the ways Australian and NZ U3As operate is revealed in the time devoted to activities 5 and 6 in Tables 8A and 8B. In Australian U3As nearly 34% of the total administration hours derived from activities associated with staffed offices (Activity 5) whereas the NZ equivalent was negligible. Many Australian U3A groups maintain offices that are staffed by teams of volunteers, often for fifteen or more hours a week, for most of the calendar year. Office workers carry out many of the basic administrative details such as maintaining records, writing receipts, maintaining timetables, answering queries and so forth. In NZ, individuals carry out most of these activities from their homes. As a consequence, other administrative tasks (Activity 6) is high in the NZ table, representing 67% of the NZ total. The Australian equivalent is about 34%.

Later in this report lack of suitable accommodation is cited as the major problem faced by Australian U3As whereas this is of much less importance in NZ. The NZ approach, which emphasises small groups within a reasonably compact geographical region, could be argued as presenting fewer accommodation constraints than those experienced by their Australian counterparts. On the other hand, Australian groups that service a wide geographical range, and/or prefer large group sizes, need a central home base where volunteers, members and tutors can meet.

IV The financial value of U3A voluntarism

As noted earlier, within any U3A the number of courses on offer at any time is a matter of record. Therefore, the calculation of total teaching hours is likely to be quite accurate. However, the calculation of total administrative hours is subject to greater subjectivity and uncertainty. Administration tasks are many and varied and, without asking individuals to maintain a diary of the times devoted to specific tasks, the best that can be obtained is an estimate.

Tables 9A and 9B summarise the steps taken to attribute a dollar value to voluntarism within U3As in Australia and New Zealand.

TABLE 9A

The monetary value of voluntary activity in Australian U3As

1. Total volunteer hours from survey (Chart 1A - p. 16)	344,212
2. Membership of responding groups (Table 3 – p. 11)	24,870
3. Hours per represented member	13.8
4. Total Australian membership (Table 3)	32,757
5. Volunteer hours extrapolated to entire Australian membership	425,841
6. Dollar value of Australian U3A voluntarism @ $10/h	$4,250,000

TABLE 9B

The monetary value of voluntary activity in NZ U3As

1. Total volunteer hours from survey (Chart 1B – p. 16)	26,784
2. Membership of responding groups (Table 3 – p. 11)	2,002
3. Hours per represented member	13.4
4. Total NZ membership (Table 3)	2,601
5. Volunteer hours extrapolated to entire NZ membership	33,613
6. Dollar value of NZ U3A voluntarism @ $10/h	$336,000

Calculations in Tables 9A and 9B were undertaken as follows.

- Step 1: Total volunteer hours transcribed from Chart 1.
- Step 2: Total membership of all U3A groups represented in the survey.

- Step 3: Hours of volunteer work per represented member were calculated by dividing Step 1 hours by Step 2 members. On average, each U3A member is supported by more than 13 hours of voluntary expertise
- Step 4: 1997 U3A population of each country.
- Step 5: Total voluntary hours extrapolated to the entire membership of each country was obtained by multiplying Step 3 (rounded down to 13 hours) and Step 4 population.
- Step 6: The total dollar value estimate of U3A voluntarism was obtained by multiplying Step 5 by a notional value of $10 per hour.

Discussion

Points of contention about the above calculations are likely to focus on ascribing a notional value of $10 per hour for U3A expertise, and extrapolation of the data to the entire membership.

The notional value of $10 per hour seems quite reasonable given the qualifications and/or life's experience of U3A tutors and administrators. For comparison, the 1997 hourly wage for a young adult waitress at an Australian McDonald's restaurant was $10.85. Thus, there should be little argument about whether to value U3A expertise at less than this figure. For the most part, U3A teachers and administrators come from professional and other highly skilled Second Age backgrounds and they bring with them an enviable range of life's experiences. If equivalent services were provided by conventional adult education approaches involving paid professionals, the cost would exclude most consumers. In all likelihood, any argument about placing a notional value on U3A expertise will centre on how much more than $10 per hour would be a reasonable estimate.

Extrapolation of specific data to a wider population can be statistically hazardous. In this case, however, more than 75% of the U3A population was represented. Therefore, it seems unlikely that the non-responding groups would produce aberrations that would upset the general picture revealed in Table 9 calculations. However, if the non-responding population is excluded from the calculation the annual value for U3A voluntarism in Australia is more than 3 million dollars and that for NZ more than a quarter of a million dollars.

The above calculations are intended solely to draw attention to the hidden value of U3As' contributions to the well-being of the community. As discussed in Section VII the information may be helpful for:

- rebutting ageist generalisations so rampant in the wider community (including among some sectors of the Third Age population);
- developing formal proposals to state or local authorities for one-off grants to purchase equipment or other resources that will improve U3A services to society.

V Information and ideas from Management Committees

The purpose of this section is to provide some basic demographic data about U3As and to canvass some "opinions" which U3As may need to consider as the organisation continues to grow. It is important to emphasise that, in most cases, these opinions have been provided by individuals rather than Management Committees. Indeed, some of the questions were sufficiently contentious that it would be unlikely that a consensus could have been reached within many Management Committees, let alone an entire U3A group. Nevertheless, the opinions given are important because they provide a snapshot of how key decision-makers within the various groups think about the organisation.

Annual membership fees

Annual membership fees were not surveyed with the intention of making comparisons between one group and another. Rather, these data are intended to reinforce the picture revealed earlier in this report that U3As are a non-profit organisation that provide members and the wider community with a very valuable service at minimal cost. Indeed, a comparison of membership fees between various groups is a meaningless exercise. This is because some groups keep their annual membership fees extremely low by charging fees for services like teaching, printing and so forth, whereas other groups include these costs in their annual fees. In addition, levels of in-kind assistance, such as free or subsidised teaching and office space, vary widely from group to group. In-kind support in particular, as discussed later in this section, would have a major influence on the level of annual fee.

Table 10 summarises membership fees for both countries. More detailed information can be found in the charts shown in Appendix 1.

TABLE 10

Annual membership fee

	Average	Range
Australia (n=83)	$20	$2-$35
NZ (n=14)	$15	$5-$30

Annual fees charged in Australia vary widely ranging from a low of $2 to a high of $35. The two most common Australian fees are $20 (n=27) and $25 (n=24). One Australian group that operates from a retirement village and is open only to residents, charges $2. In NZ the most common membership fee is $10 (n=4). Some groups indicated they were able to keep fees very low because sponsoring groups like town councils covered the cost of printing and distributing newsletters.

About half the groups offer discount membership fees for couples living at the same address. Generally, the joint fees result in $5-$10 saving on two full membership fees.

Membership

Membership size was thought to be a variable that could influence responses to some of the questions addressed later in this report. Ninety-seven groups listed their maximum membership numbers for 1996. Membership ranged from less than 50 to more than 4000. Appendix 1 charts provide more comprehensive details. In Table 11 the membership has been clustered into groups that enable some generalities about current and preferred size to be made.

TABLE 11

Membership groups

	Small (<200)	Medium (200-499)	Large (500-1000)	Very large (>1000)
Australia (n=83)	48	19	11	5
NZ (n=14)	11	3		

Most NZ groups prefer to operate with fewer than about 200 members. Their concern is that large groups could lose the important aspect of friendship they see as being a distinguishing characteristic of smaller groups. In Auckland, for example, more than a dozen autonomous groups exist, most of which maintain a membership ceiling of about 200. As membership size approaches the limit another group is started to serve a convenient geographical cluster. This pattern also tends to occur in the Wellington region.

Many Australian groups are small, in fact 47 of the 83 responding groups (57%) have fewer than 200 members. Most of these groups are in small population centres and would not experience the same growth pressures faced by groups in large cities. Nevertheless, a number of participants from these centres expressed similar sentiments to those of their NZ counterparts, that is, smaller groups are believed to be friendlier than larger groups. A number of large or very large groups also operate very successfully in Australia. In general, administrators of these groups are in favour of larger groups because of the greater variety of courses and services that can be offered to members. The 16 largest Australian groups, five of which have memberships greater than 1000, accounted for 72% of the 24,870 Australian members represented in the survey. The largest grouping is Sydney U3A, which has more than 4000 members operating in 7 regions. A central Management Committee handles finances, newsletter production, theme lectures, travel and other "umbrella" activities. The regions themselves operate semi-autonomously.

Maximum membership size

Participants were asked what maximum membership they believed their U3A could accommodate under present conditions and to indicate what factors would influence growth beyond that point. Chart 2 on the next page shows the relationship between current size and maximum size.

Chart 2 is interpreted in the following way. Each data point represents a specific U3A and shows its current membership on the horizontal axis and maximum membership on the vertical axis. For example, point "a" shown on the Australia chart indicates that one group listed its current membership at 75 but suggested maximum membership under existing conditions could grow to 400.

The "r" values (Pearson correlations) indicate a very high relationship between current membership and maximum membership (a perfect relationship equals 1). In other words, most respondents to this question felt that their U3As were near maximum capacity. The value of 0.96 for Australia has been inflated by removing the responses from 6 groups that indicated unusually high maximum memberships (one response suggested 10,000 members). If these "outliers" had been included on the graph the vertical axis would have become so distorted that the remaining 72 responses would have been uninterpretable.

It seems likely that the issue of group size will continue to cause lively debate. In 1996 there was a lengthy discussion by electronic mail between Institutes of Learning in Retirement (ILR) groups in North America. (ILRs are similar to self-help U3As; one of the major differences is that they require affiliation with a university or college.) Likewise, discussion took place in 1997 between Australian and NZ members of the growing e-mail list "U3Atalk", and also between members of what may be emerging de facto as an international U3A e-mail network, started by U3A members in the UK. Many good points for and against large membership were aired but no agreement emerged. Preferences may well be based on perceptions of the success of one's own organisation.

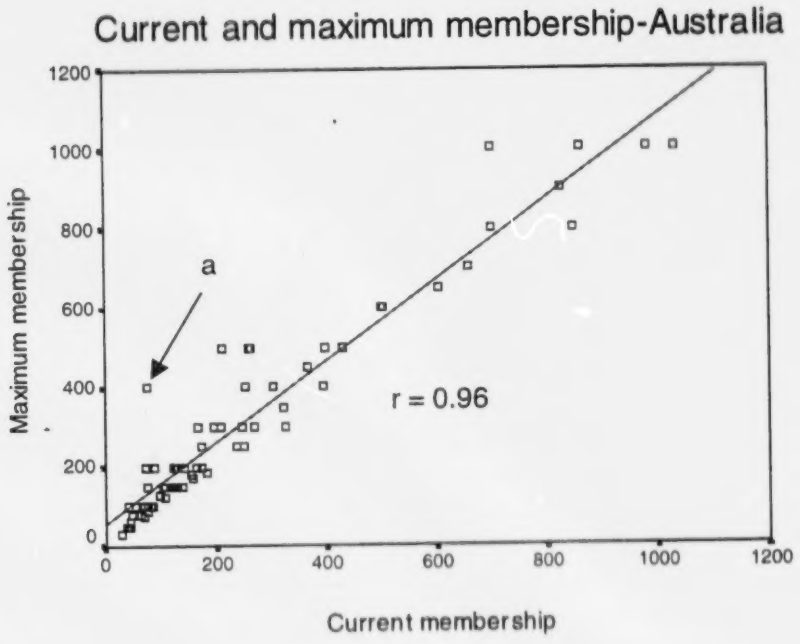
Main factors cited as influencing growth beyond the given maximum are shown in Table 12.

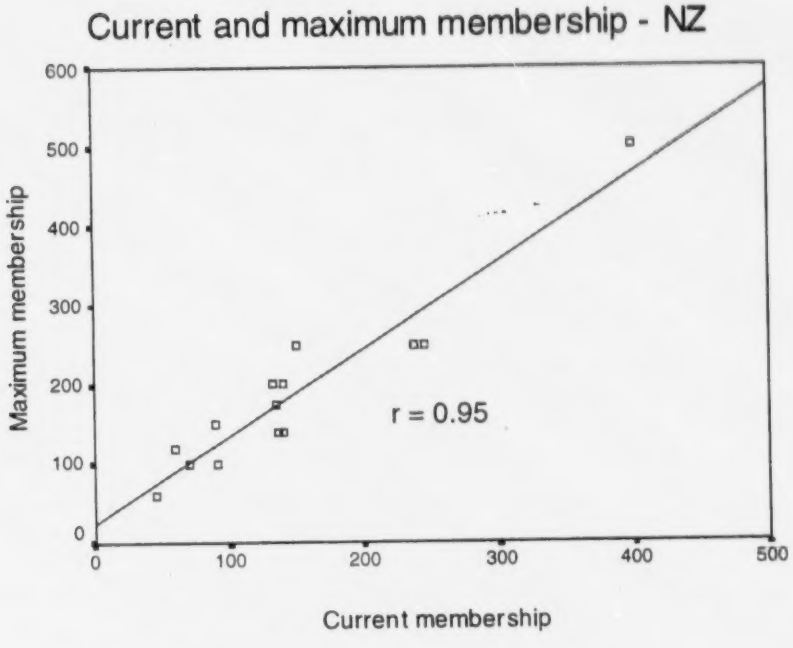
TABLE 12

Factors likely to inhibit growth

	Australia %	NZ %
Lack of suitable accommodation	38	41
Too few tutors	25	18
Too few administrators	12	23
Lack of office support	5	6
Members will lose interest	4	
Lack of other resources	4	
Others (see Appendix 1)	12	12

CHART 2


Current and maximum membership-Australia
Maximum membership
Current membership
a
r = 0.96
0
200
400
600
800
1000
1200


Current and maximum membership - NZ
Maximum membership
Current membership
r = 0.95
0
100
200
300
400
500
600

A lack of suitable accommodation is the single main inhibiting factor to future growth. However, in total, the shortage of U3A volunteers (both tutors and administrators) is the overall main deterrent. Many people completing this item regard their volunteers as currently working at close to maximum capacity.

Graphical details and a listing of items shown as "Others" can be found in Appendix 1.

Starting year

Table 13 shows the growth in numbers of groups since the U3A movement was first introduced to Australia (Melbourne) in 1984, and NZ (Auckland) in 1989.

TABLE 13

Number of groups starting in each year

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Australia (n=105)	2	3	6	14	16	6	13	13	12	6	7	6	1
NZ (n=19)						1		4	4	2	2	4	2

Information in Table 13 was extracted from the 1997 U3A Directory – Australia and New Zealand (Swindell and Vassella 1997). Fifteen of the 139 groups listed in the directory did not provide starting dates so Table 13 is incomplete. Despite this, growth trends are observable. By 1987 U3A was firmly established in almost every Australian State and Territory. This strong footing led to quite rapid growth for the next five years as established groups provided start up information for would-be groups in their regions. The very active U3A Network in Victoria developed a useful "starters kit" that was widely used by new U3A groups throughout Australia, as well as in New Zealand. Other well-organised networks in NSW promoted the rapid growth of new groups in that State. By 1993 the period of rapid start up of new groups was over. It is likely that growth in new groups will continue the tapering-off trend observable from 1993, although membership of many existing groups will almost certainly grow as the rate of growth in the Third Age population continues its rapid climb.

Since 1992, the U3A Auckland Network has been responsible for rapid growth of new groups in the Auckland region. Another cluster of U3As has emerged in the Wellington region, although no formal network exists there. The movement is now well established in major population centres in the North Island but, for some reason, it has taken quite a long time to reach the South Island. Christchurch U3A started in 1996 as the first South Island group. As the U3A ideal becomes better known it seems

probable that many more groups will develop, particularly in the South Island.

Grants and in-kind assistance

Unlike most adult education approaches the self-help U3A model is not dependent on the vagaries of agency or government funding. However, many groups are heavily reliant upon substantial in-kind support from organisations that are sympathetic to the U3A ideal. Support such as free or heavily subsidised teaching and administration space, subsidised newsletter printing, access to specialised teaching resources like computers etc. help U3As to keep their annual membership fees at the very low levels discussed earlier. Because the majority of older people have fixed and often very limited incomes, it is important to maintain low membership fees. The current membership fees would be unlikely to deter any but the most impoverished would-be member.

Tables 14A and 14B show the kind and level of support provided to Australian and NZ U3As by external organisations.

TABLE 14A

Kind and level of support received by Australian U3As

(a = once only support; b = on-going support)

	Financial grant		Teaching space		Admin space		Services		Specialist teaching	
	a	b	a	b	a	b	a	b	a	b
Local Council	17	6	2	23	1	8		9		
State Govt	5			3		3		2		
ACFE*	13	12								
Tertiary**	1	1	1	10	1	4		7	1	6
Dept of Ed				5		2		5		
Library				9				2		
Other***	9	1	4	17		4	1	7		2

* Adult, Community and Further Education

** University or Technical and Further Education College

*** Includes State Gaming Fund, retirement village, newspaper, RSL, church etc.

TABLE 14B

Kind and level of support received by New Zealand U3As

(Once only = a; On-going = b)

	Financial grant		Teaching space		Admin space		Services		Specialist teaching	
	a	b	a	b	a	b	a	b	a	b
Local Council		1	1	2				1		
Others*	4	1		4		1		3		1

*Others include:

university (1); church (1); Age Concern (1); large corporation (1); school (1); police centre (1); rural education program (1); Rotary (1); art gallery (1).

Tables 14A and 14B are interpreted as follows. Reading across the first data row for Australian U3As, for example, Local Council provided one-off financial grants to 17 groups. Six groups are currently provided with on-going financial support. Local Council also provided teaching space to two groups on a once only basis and currently provides teaching space to 23 groups on an on-going basis. The remaining data in each table are similarly interpreted.

Some groups expressed an antipathy for support of any kind, a position that may be somewhat more prevalent among NZ groups than Australian groups. Among the NZ returns, four groups (29%) indicated that they received no support of any kind; in Australia the number was 10 groups (12%).

Several objections to grants and in-kind assistance were raised on the grounds that this kind of support is transient. For example, concern was expressed that many U3As rely on subsidised teaching and administration space and, therefore, are vulnerable to market forces. This is certainly an important concern, however, the reality may be less of a concern. In many cases subsidising bodies like councils and libraries see real benefits from supporting a high profile community organisation like U3A. Moreover, because many in-kind subsidies do not readily translate into a direct dollar cost there is less likelihood than if cash grants were provided, of such support being withdrawn during difficult financial times. Some support for this generalisation can be gauged from the levels of growth in U3A that took place during the early 1990s when many countries, including Australia and NZ, experienced a sharp recession. As Table 13 shows U3As grew strongly during the recession, and most groups at that time would probably have been recipients of in-kind support. Very substantial support continues today even in the face of the current fee-for-service emphasis facing all sectors of society, including the ageing.

A major thrust of this report was to highlight the nature and extent of U3A service to the community. In the introduction to this report, some of the as yet unproven benefits of later life cognitive challenge were discussed. If the emerging link between later life cognitive challenge and health are indeed verifiable, groups like U3A are providing a very substantial health-related service to the ageing community. Provided that the self-help nature of U3A remains unchanged, grants and external support that assist groups to provide increased and better services for greater numbers of older learners, seem philosophically supportable.

Main difficulties facing U3A

Participants were asked to list in order of importance the three most important problems or difficulties dealt with by their Management Committees. Results are summarised in Tables 15A and 15B.

TABLE 15A
Main difficulties faced by Australian U3A administrators (n = 75)

Kind of problem	Priority 1	Priority 2	Priority 3	Overall
Accommodation	34	16	7	30%
Lack of tutors	21	21	5	25%
Lack of volunteers	10	5	8	12%
Lack of equipment	2	4	6	6%
Need to raise funds	3	2	3	4%
Other	17	12	13	22%

TABLE 15B
Main difficulties faced by NZ U3A administrators (n = 13)

Kind of problem	Priority 1	Priority 2	Priority 3	Overall
Lack of tutors	2	4		24%
Information to members	1		3	16%
Accommodation	2	1		12%
Lack of volunteers	2	1		12%
Publicity about U3A	3			12%
Waiting lists	2			8%
Other	1	1	2	16%

Not all groups responded to this item and, of those that did, many did not list three problems or difficulties. The column labelled "Overall" shows the percentage response of total responses. Thus, for Table 15A the top right cell showing 30% was calculated by counting the number of times "difficulties with obtaining suitable accommodation for teaching or administration" was mentioned (57) and dividing this number by the total problem mentions (189) and converting to a percentage. Graphical details and a list of problems categorised as "Other" are shown in Appendix 1.

Suitable accommodation is the main problem encountered by Australian U3As but this did not rate highly among NZ groups. Six of the 14 groups that indicated they received no in-kind support also listed a lack of suitable accommodation as one of their three major difficulties. The information shown earlier in Tables 14A and 14B indicating that many organisations are prepared to help U3A by providing substantial teaching and administration space may suggest alternatives to these groups.

Would U3As accept financial assistance?

Participants were asked the following hypothetical question:

> Imagine a future situation in which a government or funding agency provided financial assistance or resources to assist adult education organisations. Do you believe that assistance of this nature should be accepted by U3As?

Participants answering "yes" were asked to explain how they might use these resources to address any of the three main difficulties or problems earlier identified. Participants answering "no" were asked to give reasons for their opposition. Responses are summarised in Table 16.

TABLE 16

Would U3As accept government or agency support if it were available?

	Yes	No
Australia (n=81)	73% (59)	27% (22)
NZ (n=14)	50% (7)	50% (7)

Table 16 shows that the number of Australian groups in favour of accepting outside support was nearly 3 times greater than the number opposed to the idea. Responses were evenly divided in NZ U3As. Recall that in the main, responses were from individuals, albeit from influential U3A individuals, so responses do not necessarily reflect majority Management Committee views.

Table 17 shows how those answering "yes" in Table 16 would use government or agency assistance if it were available.

TABLE 17

How government or agency assistance would be used, if it were available

	Australia (n=69)	NZ (n=7)
Improve accommodation (teaching & administration)	38%	41%
Support and recruit tutors (but not pay them)	26%	18%
Resources to support administrators	17%	24%
Others	18%	15%
Pay tutors	1%	1%

As responses in Table 17 show, resources would not be used to undermine the self-help U3A approach. Most resources would be used to provide better accommodation for tutors and administrators. Greater support would also be provided for both tutors and administrators. Items suggested in this category included: running training courses for would-be tutors; advertising in periodicals read by older people; the purchase of computers, video recorders and other teaching resources like books, tapes and commercial programs; and, resources to assist tutors with teaching and preparation tasks. Only one response from each country suggested paying tutors, an approach that clearly would be antithetical to the prevalent philosophy. This item has been included in the table, even though there were several "Others" of higher ranking, to emphasise the point that advocates in favour of using external funding do not want to change the fundamental self-help philosophy of U3A. Related to this point, many who answered yes to accepting government or agency support added a proviso that financial or resources support would only be accepted if it was of a one-off or occasional nature.

Table 18 shows the two reasons given for negative responses to seeking outside support.

TABLE 18

Reasons why U3As should decline external assistance

	Australia (n = 15)	NZ (n=7)
Threaten autonomy	68%	43%
Should remain self-help	32%	57%

The threat to autonomy would surely be a major concern to almost every U3A member. In late 1997, an interesting discussion related to autonomy took place on e-mail when an American ILR group had its teaching and

administration space removed by its sponsoring university because the university needed the space for university classes. (ILRs are similar to our U3As except that each must be sponsored by a university or college. Interestingly, during the discussion, a kindred ILR suggested that the affected ILR should consider teaching its classes in community halls because these are often freely or very cheaply available. An ILR that adopted this approach would become almost identical to self-help U3As.)

A number of U3As in Australia receive considerable support from universities and TAFE Colleges. In light of the new financial pressures confronting tertiary education could such support be removed? One e-mail contribution to the autonomy discussion recounted the cases of U3A Monash, and Frankston Peninsula U3A that were evicted by the supporting university in 1990 and 1995 respectively, because the university "had more profitable use for the space". Subsequently, Frankston Peninsula U3A was also asked to leave some rooms that the local TAFE College had allowed them to use. Each of the two affected U3As has survived the traumas and is currently thriving. As reported, the strain of finding new premises was great and may have affected the health of some office-bearers.

The above provides a salutary reminder of the dangers to U3A of dependence on external support. Concerns related to loss of independence may have motivated many of the advocates of financial or resources support discussed above to stress that such support should be of only an occasional nature.

Given that the question of government or other agency support is a remote possibility, participants were asked whether their committees would consider raising membership fees to help address any of the three major difficulties discussed earlier. Responses are shown in Table 19.

TABLE 19

Possibility of raising membership fees to rectify main problems

	Yes	No
Australia (n=81)	44% (36)	56% (45)
NZ (n=14)	21% (3)	79% (11)

In NZ in particular, but also to a lesser extent in Australia, there was quite strong opposition to the idea of raising fees to help overcome the three main problem areas specified by each group. Several groups had recently raised fees and some were considering doing so in order to address accommodation problems. A number of responses supporting fee increases suggested that most members realise they are getting excellent value for their money. The main reason for opposing fee increases was a belief that this would exclude members and potential members with limited incomes.

Major accomplishments

Participants were asked to list their groups' three greatest accomplishments. The most frequently mentioned categories are shown in Table 20A and 20B.

TABLE 20A

Major accomplishments – Australian groups

Intellectually challenging opportunities	48
Social interaction	46
Wide diversity of activities	15
Promoting physical/mental health	14
Increasing membership	11
Excellent teachers and administrators	10
Special events (radio programs, conference, special lecture programs etc.)	9
Other (Appendix 1)	57

TABLE 20B

Major accomplishments – NZ groups

Intellectually challenging opportunities	9
Social interaction	8
Wide diversity of activities	4
Special interests	4
Other (Appendix 1)	10

Participants ranked the provision of intellectually challenging activities as the main accomplishment in both countries. Social interaction also rated highly. Most groups offer a wide variety of activities that combine intellectual stimulus in a social environment.

Aspirations for next five years

Participants were asked to list their groups' hoped for accomplishments within the next five years. Responses are summarised in Table 21. A full list of responses can be found in Appendix 1.

TABLE 21

Desired accomplishments within the next 5 years

	Australia	NZ
Wider range of activities	21%	17%
Increase membership	20%	33%
Satisfactory accommodation	15%	
Satisfy member needs	7%	
More volunteers	4%	
Start new chapter	4%	
Own accommodation	4%	
Maintain enthusiasm	3%	17%
Others (Appendix 1)	22%	33%

No single issue stands out as a desired accomplishment within the next few years. Groups in both countries see increasing the range of activities, and attracting more members as being relatively important. A need for satisfactory accommodation (15%) and a desire to own ones accommodation (4%) show the importance of accommodation issues within Australian U3As, but not NZ U3As.

Teaching

One of the major characteristics of the U3A self-help model, and almost certainly one that is associated with its rapid and continuing growth, is its ready accessibility by retired people. Cost is minimised by running courses in accessible places in the community, and at times that suit older learners. There are no restrictions on membership (other than being in one's Third Age) and, generally, any member is encouraged to develop and offer courses that s/he feels qualified to run.

During recent U3A conferences discussion has focused on the laissez faire approach adopted by the majority of self-help U3As. Some suggestions have been made that U3A should adopt a more traditional approach to education, and focus on "higher standards". In order to test the general levels of support for change of this nature a number of questions were asked that directly or indirectly relate to whether U3As are in favour of a move towards more structured approaches to teaching and learning.

Participants were asked to tick one of three given answers to the question "In an ideal world, where would you prefer the **majority** of your U3A

activities to be held?" Responses are shown in Table 22.

TABLE 22

Preferences for teaching venues

	Australia (n=84)	NZ (n=14)
Formal settings, eg. university or college	8%	
Convenient community locations	81%	100%
Doesn't really matter	11%	

There was no equivocation about the NZ responses; they all supported U3A courses being offered from convenient community locations. In Australia, 10 times as many groups supported the community setting as those supporting formal settings.

For many groups "convenient community locations" includes tutors' homes. Table 23 shows the percentage of groups in which tutors use their homes to run courses and the percentage of all courses run from homes.

TABLE 23

Percentage of activities held in members' homes

Teaching in homes	Australia (n=82)	NZ (n=14)
none	32%	
1% - 20%	57%	21%
21% - 40%	7%	7%
41% - 60%	2%	21%
61% -80%	2%	14%
>80%		37%

All NZ groups and 68% of Australian groups run some courses from tutors' homes. NZ groups make much greater use of this resource than Australian groups do, perhaps reflecting the preference by NZ management for small groups servicing a reasonably tight geographical area. The majority of NZ groups run 50% or more of their classes from tutors' homes. One NZ group offers all its courses from private homes. In Table 22 all New Zealand groups expressed support for the community setting approach to U3A; this support is further emphasised by the high

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usage of tutors' homes.

The issue of academic standards and tutors qualifications has been raised from time to time. During the 1995 U3A Canberra conference, which attracted wide representation from Australian and NZ groups, a paper entitled "Academic standards: How do we maintain them?" excited considerable audience reaction. Discussion centred round course content and qualifications of tutors. The survey addressed each of these issues.

Participants were asked to tick one of three boxes indicating their preference for the kind of content that ideally should be placed on the majority of U3A activities. Responses are summarised in Table 24.

TABLE 24

Desired content in U3A courses

	Australia (n=84)	NZ (n=14)
Should be more academic in nature	2%	
Almost anything, within the U3A ideal of providing intellectual challenge	97%	100%
Some other option	1%	

Responses were overwhelmingly in favour of maintaining the laissez-faire approach to course content. A number of comments were made that members would not continue to attend a course that did not meet their needs, and this was the only regulatory mechanism needed. (The matter of monitoring courses and teaching is addressed later in this report.) One Australian response disputed the wording of the second option in Table 24 and suggested that the courses need not be intellectually challenging. S/he was in favour of allowing any activities of interest to members and also claimed that many of the members had no interest in intellectually challenging pursuits.

Table 25 addressed the issue of teacher qualifications. Again, participants were asked to tick one of three possible responses.

TABLE 25

Preference for tutors' qualifications

	Australia (n=84)	NZ (n=14)
1. A member with prior teaching/tutoring background	12%	7%
2. Any member who has something to offer, regardless of prior background	82%	86%
3. Some other (describe)	6%	7%

Tutors' formal qualifications are not an important issue to the large majority of U3As from each country. More than 80% of participants from each country chose option 2, which further substantiates the laissez faire approach to the teaching-learning environment. The few participants who selected option 3 mainly stressed the importance of having a combination of 1 and 2. For example, it was felt that in some areas such as languages or maths and sciences, a teaching background was a distinct advantage. In other areas like art, literature, photography, politics, dance etc. the background knowledge and experiences may be more important than the pedagogical aspect. The difference between teaching in schools and teaching to a specialised adult education group like U3A members was also emphasised. One participant highlighted the importance of using teaching methodologies that are best suited to adults who like to exchange ideas rather than take part in a one-way flow of information. Another advocated a preliminary screening process such as an interview with a Management Committee member who has an education background, to ensure that no fringe courses are offered that could harm the reputation of U3A. Such an interview would also pick up whether the would-be tutor had the necessary organisational as well as teaching/communication skills to manage a group.

Participants were given 3 general statements related to the monitoring of teaching and other activities within their groups and asked to tick as many of the statements that applied. Responses are summarised in Table 26.

TABLE 26

How U3As monitor teaching and other activities

	Australia (n=84)	NZ (n=14)
1. Feedback from students and/or group leaders	73%	86%
2. No monitoring.- "market forces" determine whether courses are viable	58%	71%
3. Other (describe)	5%	7%

Participants could check any or all of the three options, therefore, responses are interpreted a little differently from those in earlier tables. Thus, for the NZ column, 86% of groups sought feedback from students and/or group leaders; 71% of groups also allowed market forces to prevail, and 7% also used another alternative such as a group liaison officer to monitor courses. The Australia column is similarly interpreted.

Some of the ideas included as "Other" were:

course coordinator and committee members encouraged to attend classes;

annual meeting of tutors to discuss teaching ideas and courses;

feedback only if registrations drop off considerably; and,

summary of course content, and if possible, aims and objectives before the course is offered.

The foregoing data on teaching-related matters clearly indicate that most are happy with the existing way that the academic program is managed. A number of U3A groups that are associated with universities or colleges have been able to negotiate arrangements with the sponsoring body, which provide opportunities for members to take part in traditional academic activities. For example, interested members may sit in on formal lectures and tutorials at no charge; or a university or college may run a guest lecture series specifically for U3A. Regardless of whether or not a U3A is associated with a formal tertiary provider, the most important point is that every group is completely autonomous. Management can help to steer U3As in any direction that members desire.

New technologies and related courses

U3A members have shown an increasing interest in learning about new technologies such as computers, and related activities like the Internet and electronic mail. Most U3As do not have the resources to purchase specialised equipment to cater for members' interest in learning about new developments. Participants were asked how they attempted to overcome the problem of a scarcity of resources needed to meet new demands by members. Table 27 shows a range of alternatives

TABLE 27

How groups cater for activities involving expensive or scarce equipment

	Australia (n=70)	NZ (n=9)
Borrow/hire equipment	24	2
Advise of courses elsewhere	13	7
Don't run these	11	
Request a grant	10	
User pays	9	2
Others (raise funds, request donations, search for tutors etc)	16	

Flexible learning is one of the new "buzz words" in education that is associated both with new communications technologies and a desire to cut down the cost of formal education. New educational opportunities are rapidly increasing via the Internet, and through more traditional educational media such as print, video and TV. This flexibility could have advantages for U3A by increasing the range of courses

available, and widening the membership base to include those who are isolated by distance or incapacity. Moreover, a U3A course "without walls" could allow members from any Australian or NZ group to benefit from a U3A tutor who has specialist skills that are not generally available. On the down side, some flexible learning opportunities may decrease the "learning in a social environment" aspect that so many members regard as invaluable. To test whether U3As might be interested in flexible learning opportunities, the following question was asked:

> Imagine that a quality activity had been developed on (say) history, or creative writing, which could be offered by distance education methods (eg. packages of notes, tapes and videos) to U3A members elsewhere, with participants providing their input through letter, fax, electronic mail, and so on. If such offerings were available might your U3A support the idea?

Responses are summarised in Table 28.

TABLE 28

Support for flexible learning opportunities

	Australia (n=80)	NZ (n=13)
No	14%	39%
Yes	44%	22%
Maybe	42%	39%

A "maybe" response can be taken as in-principle support for an idea, provided certain problem areas are satisfactorily addressed. With this interpretation of the responses, some 86% of Australian groups and 61% of NZ groups would be prepared to experiment with flexible learning approaches in order to broaden the range of available courses. The kind of provisos and their frequency were:

> cost (11); members' choice (8); possible loss of social interaction (8); course suitability (6); equipment availability (6); tutor availability (4); ease of implementation (3).

The generally outward looking views summarised in Table 28 suggest that many U3As are now more open to the possibility of collegial interaction between the various groups than was the case some years ago. During recent U3A conferences, cautious moves to explore the possibility of greater interaction between groups were overwhelmed by vigorously expressed arguments about fears of loss of autonomy. The above data appear to indicate that future discussions about inter-group developments need not become overwhelmed by such arguments.

New members

Many U3As use a range of approaches to actively recruit new members. Table 29 shows the percentage of groups that actively recruit members.

TABLE 29

Percentage of groups actively seeking new members

	Australia (n=84)	NZ (n=13)
Actively seek new members	92%	85%
Do not actively seek new members	8%	15%

A variety of methods are used to recruit members. The most common of these are: advertising in the media; word of mouth (not really an active recruiting method unless members and others are asked to spread the word); brochures; displays; and, special promotions.

It is possible that a number of groups may want to consider widening their recruiting methods. For this reason the full list of methods and percentage of use is shown in Appendix 2.

Former occupations of U3A management

The success of U3A is attributable in very large part to the efforts of U3A management and other volunteer administrators (see Section III). In an earlier study (Swindell 1993) it was shown that U3A attracts people with considerably better than average education levels when compared with those of the general ageing population. It seems reasonable to speculate, therefore, that the energy and vision displayed by so many U3A administrators would be associated with high levels of education, expertise and experience gained during the Second Age.

Participants were asked to describe as accurately as possible the kind of occupations that current major office bearers had held immediately before their retirement (eg. carpenter, business owner, accountant, home-maker etc.) The diverse occupations were then grouped into one of 4 major categories of:

- Professional – ie occupations entailing study at a university or equivalent;
- Trade – ie occupations requiring a certificate or qualification not normally involving university study;
- Home-maker;
- Business eg small business owners/employees.

The former occupations of U3A office bearers are shown in Charts 2A and 2B. The charts are interpreted as follows. Chart 2A, for example, shows that 60 presidents were formerly from the professions, 3 were from the trades, 7 were home- makers and 11 were from business. The former occupations of other office bearer are interpreted in a similar way.

Charts 2A and 2B show that the great preponderance of administrators formerly held professional or other positions that require higher education qualifications. A listing of all former occupations of office bearers can be found in Appendix 2. This listing reinforces the speculation that the expertise of many U3A administrators flows on from earlier life experiences, further adding substance to the discussion in Section IV that a notional value of $10 an hour for U3A expertise is conservative.

Chart 3A: Former occupations of major office bearers

Australian U3As

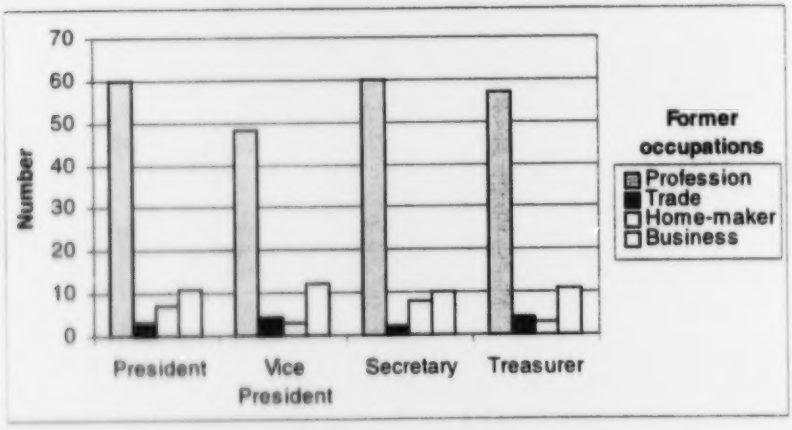
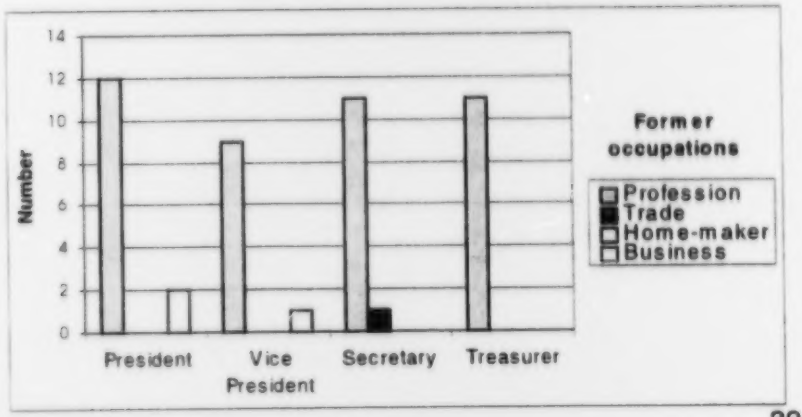


Chart 3B: Former occupations of major office bearers

NZ U3As



VI Possibilities for the future

Society is changing very rapidly and U3As must continue to evolve to meet the needs of new cohorts of retired people. This section summarises and briefly discusses participants' reactions to 18 futures-oriented statements that may confront future U3A management. A number of these issues have been alluded to earlier in this report; others have been discussed at U3A conferences and meetings; still others are possibilities based on present trends and their possible implications for U3A.

Participants were asked to react to each of the 18 statements (see Appendix 3) by ticking one of 5 options designated as strongly agree; agree; neutral; disagree; and, strongly disagree. Options were coded from 1 to 5; 1 = strongly agree to 5 = strongly disagree, and responses were totalled for each country/state and averaged. Responses are summarised in Table 30.

TABLE 30

Possibilities for the future

	NSW* (n=21)	NZ (n=14)	Qld (n=17)	SA (n=5)	Tas (n=3)	Vic (n=35)	WA (n=3)	Avg all
1. Will be difficult attracting volunteer administrators	2.3	2.7	2.4	3.4	3.0	2.5	2.0	2.5
2. May need to pay an administrator	3.1	3.7	3.8	3.6	3.0	3.1	4.3	3.4
3. Payment will undermine self-help nature	2.4	2.1	2.0	2.2	3.0	2.4	1.7	2.3
4. U3As will help in libraries, art galleries, museums etc.	2.9	3.2	2.4	2.8	2.7	2.5	3.3	2.7
5. Will carry out research relevant to the wider Third Age population	2.2	2.6	2.0	2.4	2.3	2.3	2.0	2.3
6. Will need to attract under-represented groups	2.1	2.6	2.6	2.6	2.3	2.1	2.7	2.3
7. Use distance education methods to help mentally alert frail elderly and isolated older people	2.2	2.8	2.5	2.4	2.3	2.2	3.3	2.4
8. Pay outside experts to run some specialist courses	3.7	3.4	4.3	3.6	3.3	3.7	4.0	3.7
9. Pay for specialist teaching facilities	3.1	3.4	3.1	3.6	3.3	3.0	4.3	3.2
10. Governments provide funding to help U3As	2.8	3.5	2.6	1.8	3.3	1.9	3.7	2.5
11. Growing technological demands on older people	1.8	2.4	1.8	2.0	2.0	1.8	2.0	1.9
12. Fewer jobs therefore younger members	1.8	2.1	2.1	2.0	1.7	2.0	3.0	2.0
13. Future members' interests will differ from today's	2.4	3.1	2.8	2.2	3.3	2.3	3.0	2.6
14. More emphasis on retired people helping themselves	1.8	2.0	1.8	2.0	2.0	2.1	2.3	2.0
15. Much greater communication and sharing resources between U3As	1.8	2.1	2.2	2.2	3.0	2.1	2.0	2.1
16. More activities away from home base eg travel	2.1	2.5	2.1	2.2	3.0	2.0	2.7	2.2
17. Members should pay considerably more for higher level of service	3.2	3.6	3.7	3.0	4.0	3.6	4.0	3.5
18. Centralised "clearing house" for borrowing resources	1.9	2.6	2.2	2.0	2.3	1.9	2.3	2.1

* Includes ACT

Average responses are shown for each region. The average for all responses is shown in the final column. Lower numbers that cluster around 1.5 to 2.5 indicate on average that respondents tended to agree with the statement; responses clustered around 3 are neutral; and higher numbers around 3.5 to 4.5 show that respondents tend to disagree with the statement.

There was general agreement with statements 3, 5, 6, 7, 11,12,14, 15, 16 and 18; neutral responses to statements 1, 2, 4, 9, 10, 13 and 17; and disagreement with statement 8. Within many of these items responses differed widely by state, perhaps reflecting regional circumstances.

Analysis of Variance on item 10 querying whether governments should be asked to provide funding to help U3As to develop, showed a significant difference in responses between states $F(6,91)=4.718$, $p<.001$. The states most in favour of government funding were Victoria and NSW, each of which has strong networks and communications channels that keep members informed of events outside their own immediate groups. Many U3A groups within both states have successfully attracted government grants, and the U3A Network–Victoria recently attracted a very large State Government grant for disbursement to member groups.

All regions agreed with statement 3 that payment for some administrative services would undermine the self-help nature of U3As. This position was further reinforced with general opposition to item 8, which polled the idea of paying outside experts to run some specialist courses. These latter responses indicate that groups advocating government funding do not see external funding jeopardising the self-help approach.

Support for a number of items shows that many U3A administrators have an outward-looking vision for their organisations. Items 5, 6 and 7 suggest that groups are prepared to consider reaching out beyond traditional boundaries to help bring U3A expertise to a wider community. Similarly, items 15 and 18 are quite strongly in favour of greater liaison between groups. These responses suggest that some of the vigorously expressed opposition voiced in the early 1990s, to suggestions that U3As might benefit from stronger links with each other, may be waning.

VII Concluding comments

U3A members clearly derive benefits from the programs of cognitive challenge provided freely by their colleagues. As yet, the nature of these benefits is unknown. Section I discussed a number of tentative links between cognitive challenge, social networks and well-being. Should any of these prove to be correct then the self-help U3A approach to later life adult education is making a very substantial contribution towards the well-being of the wider community, not just to the U3A community. This is because every dollar saved through minimising demands by U3A members on medical and other subsidised social services is a dollar potentially available to more needy sectors of society - a telling argument for those grappling with questions of resource allocation and equity.

U3A is an extremely effective adult education organisation in Australia and New Zealand. With no coordinated assistance and little in the way of formal external support or funding, the movement has grown rapidly in both countries. By the end of 1997 U3As in the region were providing numerous opportunities for more than 35,000 older people to take part in cognitively challenging activities within a socially stimulating environment. This growth could not have taken place without the expertise of the many volunteers on whom the self-help approach is based. A conservative calculation of the monetary value of this expertise suggests that the U3A movement in Australia and NZ is worth in excess of four million dollars annually.

It must be stressed that the calculation of U3A "worth" is intended solely to highlight the vastly undervalued contributions made by a specific group of older people to society. There is no suggestion that U3A volunteers should be paid for their expertise. Indeed such a move would completely undermine the self-help nature of the movement, which is arguably its greatest strength. However, money talks. Individual U3As might want to use the above data and method to estimate the value of their own organisations and use this information to advertise the contribution their groups are making to older people in the local community. As this study has shown, many U3As actively recruit new members, therefore, at the very least, details about U3A's contribution at the local, State or national level would provide eye-catching advertising for U3A.

Section VI surveyed a number of future scenarios. The item attracting the highest overall support was the statement "In the future, the technological demands on the Third Age population will increase". Eighty-five of 98 responses (87%) strongly agreed, or agreed with this statement. A concomitant of pressure on third agers to keep abreast of facets of new technology will be demands by members for courses to help them to understand and use the technology to their advantage. Indeed, anecdotal comments suggest that requests by members for introductory computer courses are growing faster than in any other subject area. Table 27 (p. 36) showed a range of ways in which groups currently respond to requests

for specialist activities involving expensive or scarce equipment.

New technology and U3A

A vast array of intellectually challenging opportunities has opened up via the World Wide Web, and rapidly growing numbers of retired people now recognise the value of this medium for enhancing their lifestyle options. Moreover, as more and more computer-literate people retire, the challenge will grow for U3A management to make use of the essentially limitless new learning opportunities which can be facilitated through the Web.

As an example of new learning opportunities, it is now possible to connect electronically to the world's great libraries, as well as to other sites which, in a matter of seconds, can link users to hitherto unavailable material. Universities around the world are also examining the implications of the Internet and how it may change the face of traditional university teaching. Increasing numbers of universities are placing course materials on the Internet with a view to attracting students from anywhere in the world. In some cases it is possible to gain access to packages of learning materials freely through the Web. At the moment anyone can use these materials but they can't get credit towards a degree without paying the enrolment fee to the university. The Internet looks set to revolutionise higher education with fewer students needing to physically travel to specific locales in order to access the required learning. For U3As the prospect of gaining almost immediate access via the Web to valuable learning and teaching resources, including video and sound materials as well as conventional print materials, regardless of distance or location, suggests entirely new learning opportunities which could begin today.

The above is not to suggest that electronic communication will supplant traditional U3A teaching and learning within a social environment. Members are most unlikely to want to lessen the number of opportunities for meeting face-to-face with like-minded colleagues. Rather, the suggestion is a reminder that society is changing very rapidly thanks to the ubiquitous microprocessor, and U3A managers must continue to think progressively if U3A is to remain a mainstream adult education organisation. To avoid the possibility of the organisation becoming moribund U3A decision makers must grapple with ways of introducing expensive new teaching and learning technologies into the "basket" of intellectually challenging offerings for new as well as existing members. The popularity of the introductory computer courses that are now offered by many U3As shows that members want to come to grips with new technology. Provided that new technology courses are well taught, with the emphasis on learning at one's own pace rather than at the instructor's pace, there may be no boundaries to what U3A members will want to do with the technology.

Most of the groups that have yet to introduce computer-related courses appear to have been constrained more by a lack of resources than a lack of will. Some U3As have been able to circumvent the resources problem

by developing close ties with nearby universities, colleges or high schools. These organisations have been happy to make their computer facilities available to U3As, outside normal student hours for little or no charge. However, the majority of U3As do not have ready access to a friendly sponsor in the formal education sector. In all likelihood they will probably have to, or have already had to seek financial assistance in order to purchase sufficient computers to run classes for members.

As shown in Table 16 (p. 28) the majority of U3As are prepared to accept external funding provided that this does not compromise the self-help U3A ethos. The big question remains - where is the kind of funding available that can equip U3As with computers and other related technology that would help them to better meet their educational objectives?

A number of points have been discussed in this paper, or have emerged from the research, namely, U3As:

- are open to any Third Age person in the rapidly growing ageing community;
- are conservatively estimated to contribute more than $4 million dollars annually in the form of in-kind service to U3A members;
- improve the quality of life of the more than 30,000 members; and
- may directly contribute to the prolonged health of older people by providing new opportunities for intellectual challenge and developing social networks.

It seems likely that individual U3A groups could craft these four points into a formal submission for financial support. The submission could then be presented to one or more of the following agencies requesting a one-off grant for the purchase of computing equipment or other expensive resources that will help members to improve their quality of life.

Many countries have licensed gambling, or national or State lotteries. Frequently, as part of the quid pro quo for issuing gambling licences, governments have stipulated that a percentage of the revenue must be diverted to worthy community organisations. For example, in Australia, each State has legalised casinos and these annually provide grants of millions of dollars to charitable organisations and clubs. In the State of Queensland the Community Fund, which was established to redistribute some of the profits from casinos, provides grants for capital expenditure to non-profit organisations of up to $150,000, and to a total of around three million dollars annually. A number of Australian U3As have obtained large grants from these sources.

State and local governments also are appropriate bodies for individual U3As to approach for assistance. Table 14A (p. 25) shows that both branches of government have been strongly supportive of Australian groups. Many U3A members have held important public offices in their paid working lives and some probably retain links with government officials who could provide suggestions about how best to present a submission. Even in times of financial constraint governments are prepared to fund worthy organisations, particularly if they have a high community profile like

U3A has. Recently, the U3A Network-Victoria was successful in gaining a $70,000 grant from the Department of Human Services in Victoria. Other community organisations, such as Rotary, Lions, Apex and so forth, which are involved with charitable fund raising for worthy causes, may also be prepared to provide assistance.

As a final speculative idea, the International Year of Older Persons in 1999, as well as the turn of the millennium, may provide unique opportunities for funding. It is possible that governments may see fit to celebrate these major events by releasing one-off funding for national projects that are seen to be in the community interest. If that were the case, U3As would be in an excellent position to argue for support from these sources.

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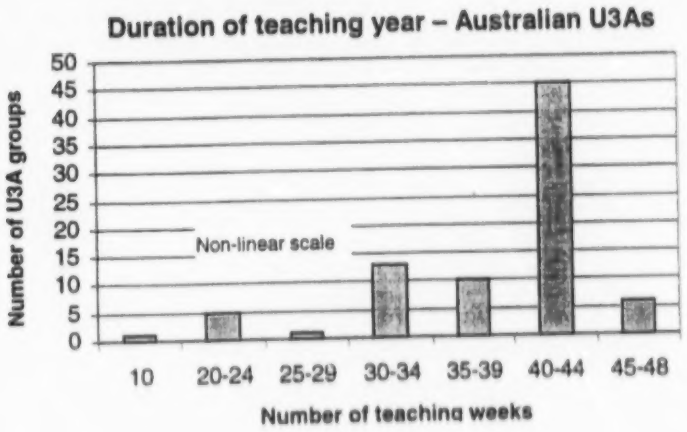
Appendix 1 Additional Australian Charts



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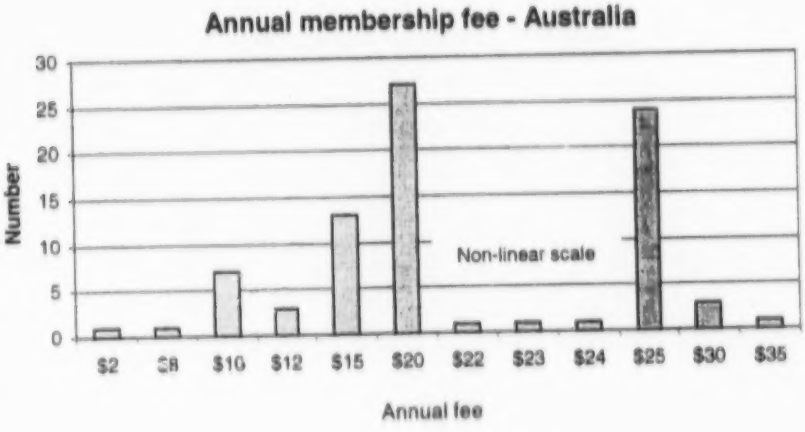

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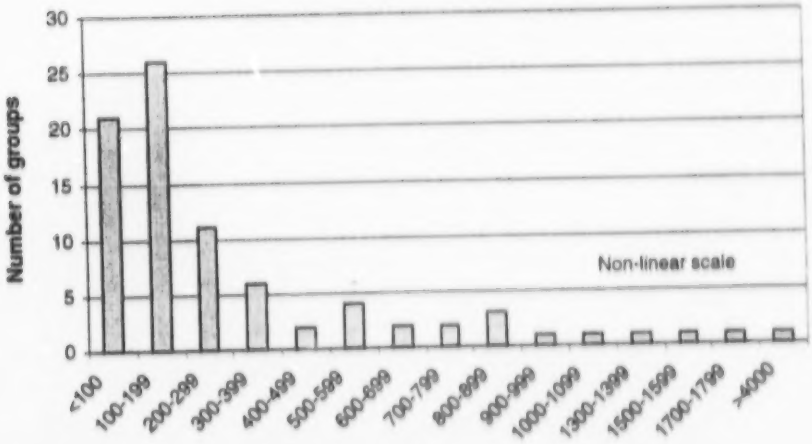

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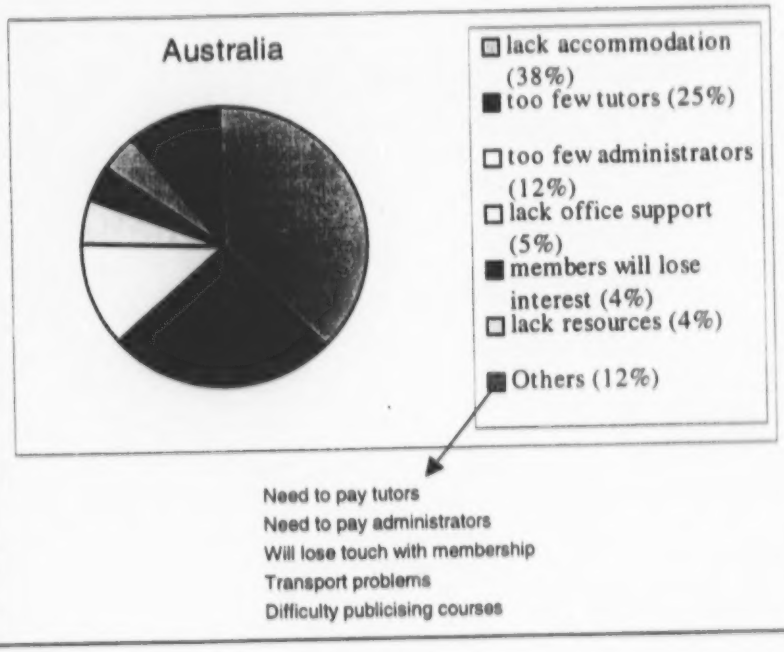
Factors influencing membership growth beyond present level



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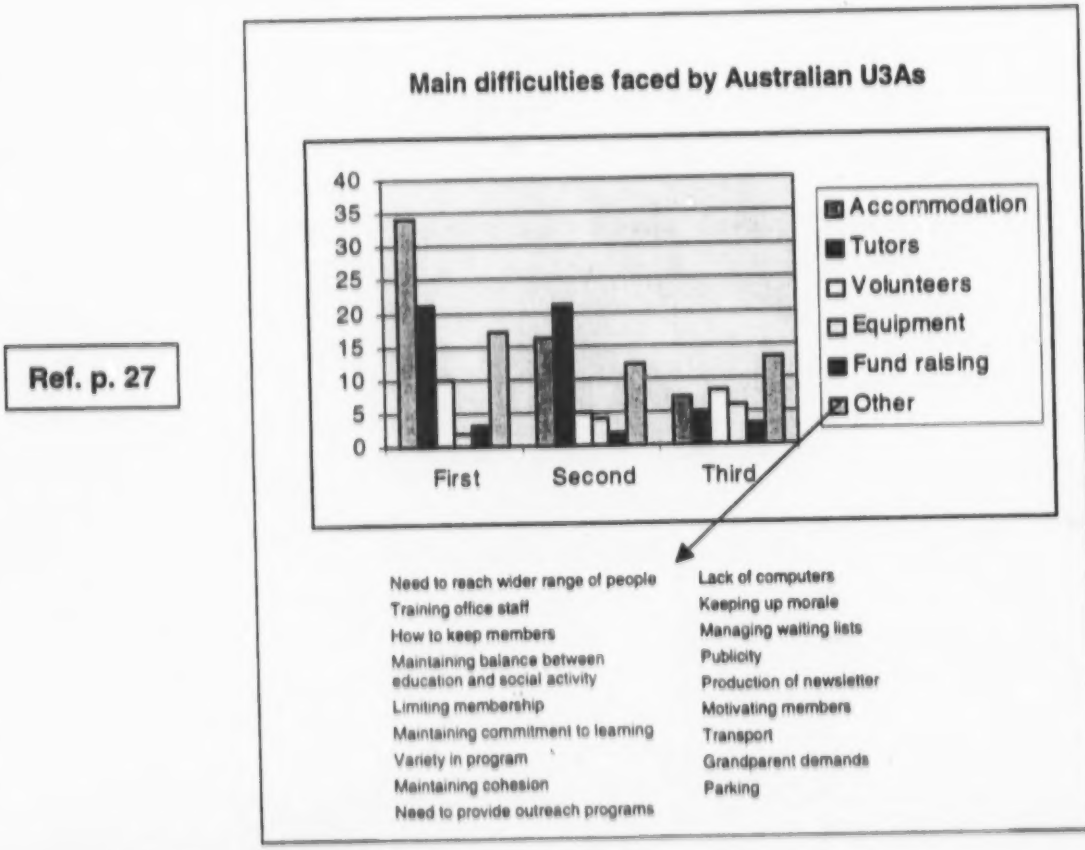
Main difficulties faced by Australian U3As



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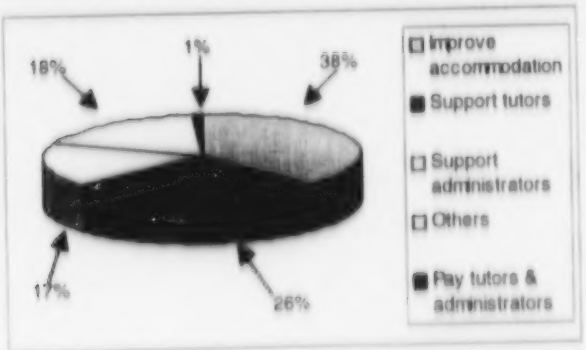
Use of funds/support if they were available



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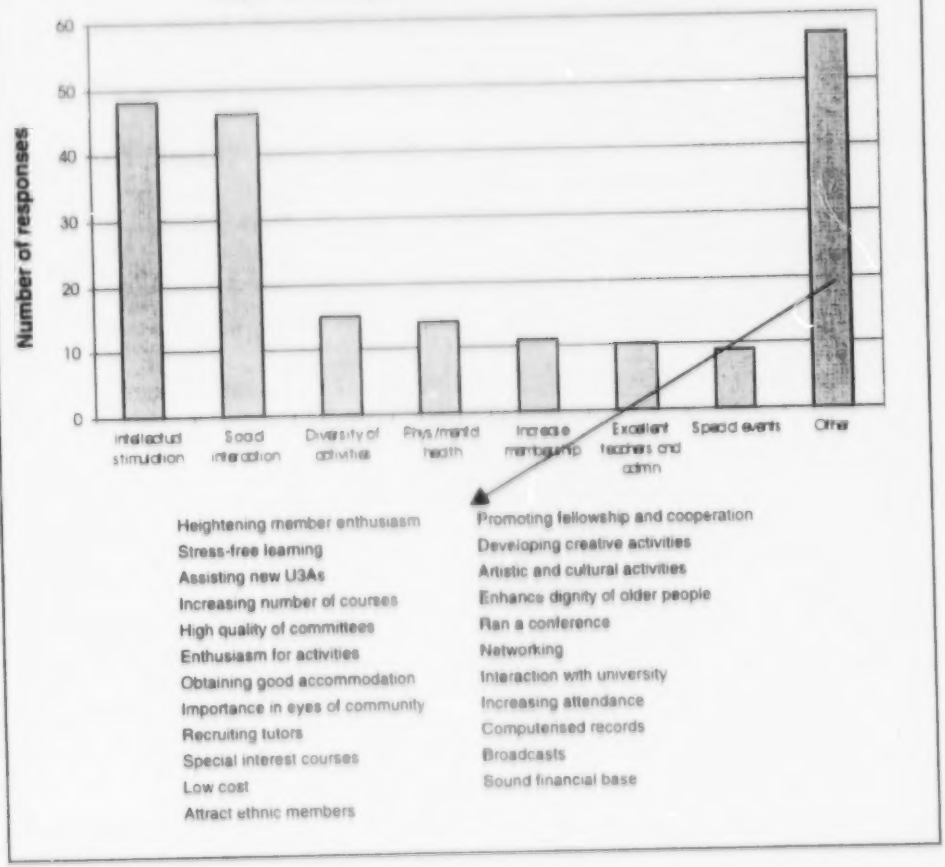
Major accomplishments – Australian U3As



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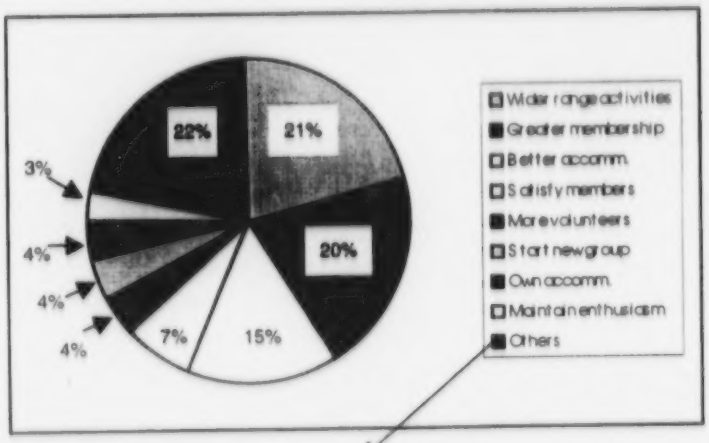
Ref. p. 32

Desired accomplishments within next 5 years

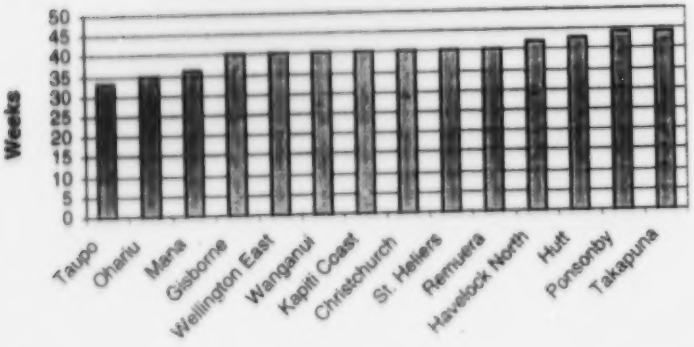


Retain autonomy
Computerised administration
Adequate finance
Integrate with other groups
Increase commitment to learning
Outreach programs
Connect to email
Leadership training
Greater diversity

Interchange of tutors
Improve resources
Greater community awareness
Activities for ill and frail elderly
National resource centre
Use Internet to reach out
Increase tutors
Host a conference

Appendix I Additional NZ Charts

Duration of teaching year – NZ U3As



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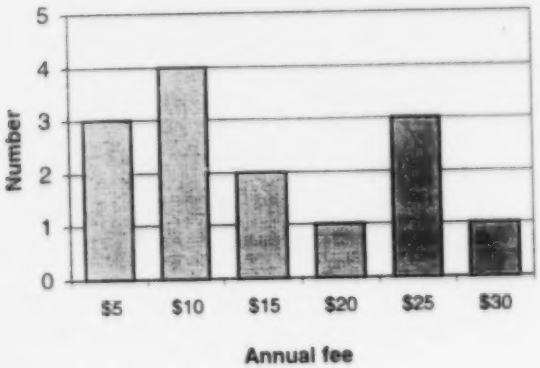
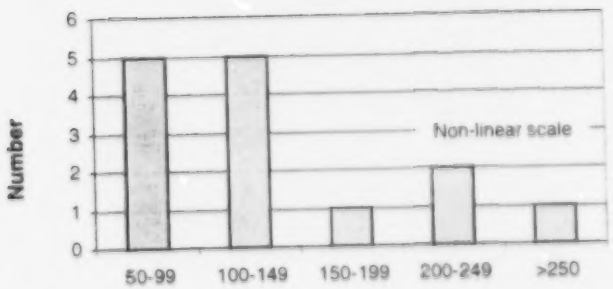
Annual membership fee - NZ

Ref. p. 20



Membership range – NZ U3As



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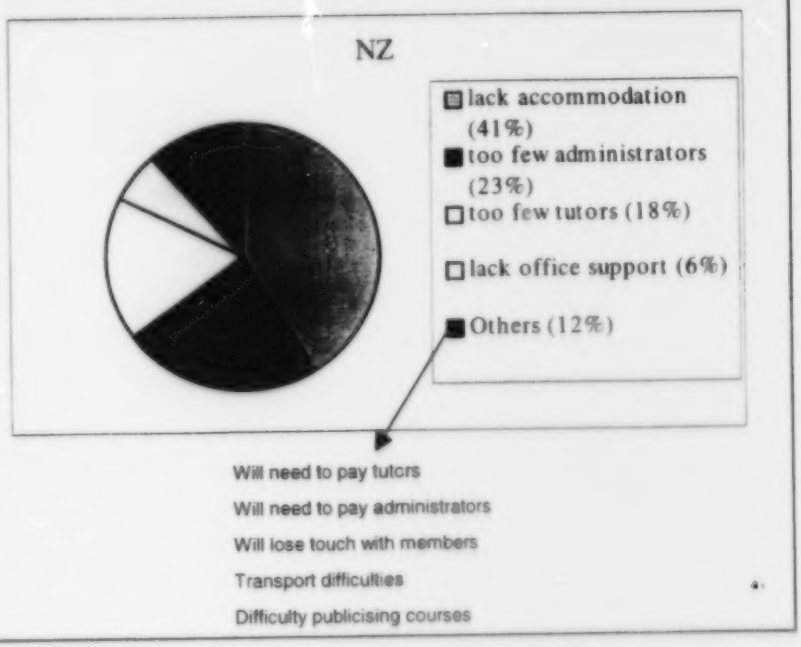
Factors influencing membership growth beyond present level



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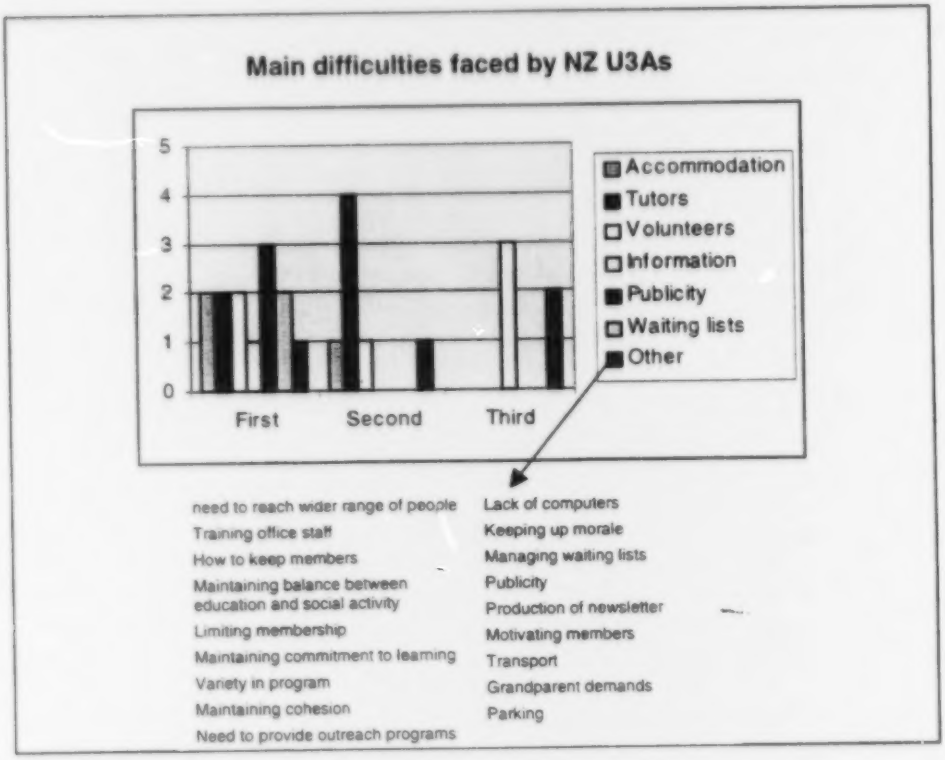
Main difficulties faced by NZ U3As



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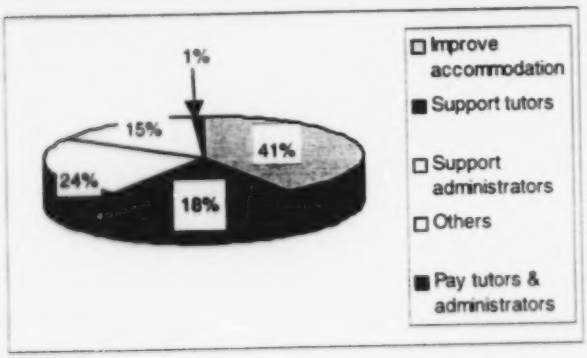
Use of funds/support if they were available



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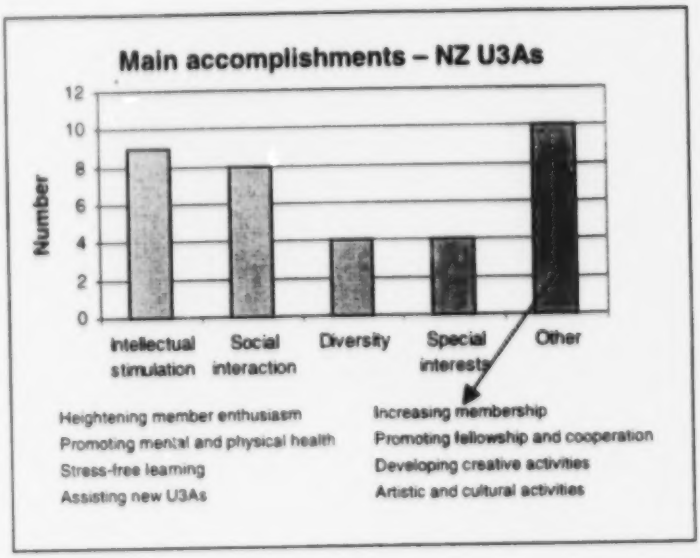
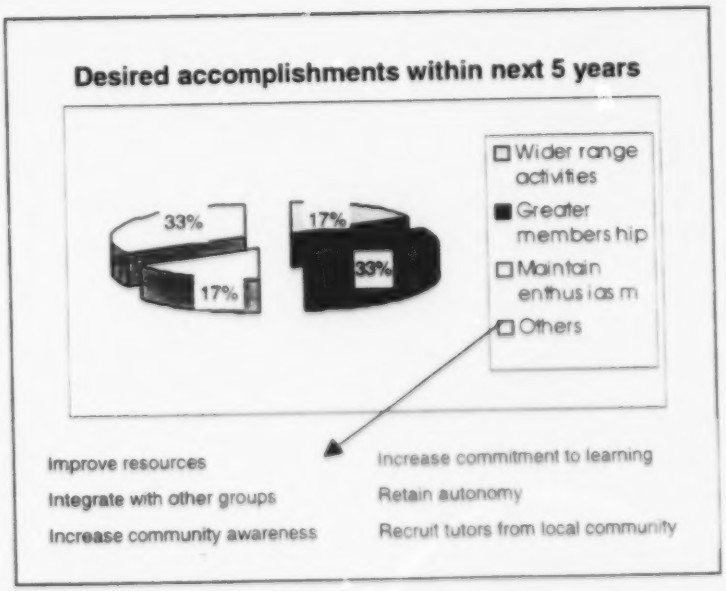
Ref. p. 31

Main accomplishments – NZ U3As



Desired accomplishments within next 5 years



Ref. p. 32

Appendix 2 Former occupations of principal office bearers

Ref. p. 39

Professional

Electrical Engineer
Nursing
Director of Nursing
Doctor
Engineer
Ship Officer
Law
Journalist
Librarian
Pharmacist
Research
Police
Social worker
Assistant Director of Government Department
Podiatrist
Australian Post Executive
Patent Attorney
Professor
Scientist
Educational Psychologist
Health Surveyor
Army Officer
Nun
Computer Analysis
Radiographer

Semi professional

Clerk
Registrar
Civil Servant
Town Clerk
Ambulance Officer
Hospital Administrator
Medical Technologist
Law Clerk
Media Personality
Research Technician
Town Clerk
Manager Research and Development
Project Manager
Director of Lifeline
Technical Officer

Trade

Shop Worker
Estimating Foreman
Real Estate Sales
Electrician
Plan Tracer
Plumbing Consultant
Shop Assistant
Forester
Station Master

Blue Collar

Steel Worker

Teaching

Secondary Teaching
Teacher
Academic
Teacher/Librarian
Principal
Deputy principal
TAFE teacher
CAE lecturer
Nurse educator
Nurse tutor
Dance teacher

Business

Owner
Farmer
Grazier
Publishing
Interior Decorator
Shop owner
Wool Broker
Security firm
Garage
Retail manager
Commercial manager
Agricultural Consultant
Hotel

Financial

Banker
Book Keeper
Bursar
Purchasing Officer
Accounts Clerk
Accounts Executive
Share Registry Manager
Payroll Clerk
School Registrar

Home Maker

Appendix 2 Methods used to actively recruit members

Ref. p. 38

	Australia	NZ
Advertise in media	74%	54%
Word of mouth	60%	62%
Brochures	26%	46%
Displays	18%	15%
Special promotions	14%	46%
Talks to other organisations	13%	8%
Circular to other organisations	13%	23%
Hold open days	11%	
Pre-retirement course	1%	8%
Try before buy	1%	

Appendix 3 Groups participating in the study

U3A ACT INC	ACT	U3A - PORT ADELAIDE BRANCH	SA
GISBORNE U3A	NZ	U3A - SA (ADELAIDE BRANCH) INC	SA
HAVELOCK NORTH U3A	NZ	U3A FLINDERS BRANCH	SA
HUTT U3A	NZ	U3A GAWLER BRANCH INC.	SA
KAPITI COAST U3A	NZ	U3A MT GAMBIER BRANCH INC	SA
MANA U3A INC	NZ	U3A SOUTH COAST INC	SA
PONSONBY U3A	NZ	LAUNCESTON SCH FOR SENIORS	TAS
U3A CHRISTCHURCH	NZ	U3A CYGNET	TAS
U3A OHARIU INC	NZ	U3A HOBART INC	TAS
U3A REMUERA (AUCKLAND, NZ)	NZ	BERWICK DISTRICT U3A INC	VIC
U3A ST HELIERS	NZ	BOX HILL U3A	VIC
U3A TAKAPUNA	NZ	DONCASTER - TEMPLESTOWE U3A	VIC
U3A TAUPO	NZ	GOULBURN VALLEY U3A INC	VIC
WANGANUI U3A	NZ	HUME U3A	VIC
WELLINGTON U3A E SUBURBS	NZ	LATROBE VALLEY U3A INC	VIC
FORBES COLLEGE FOR SENIORS	NSW	MANSFIELD U3A	VIC
FORSTER/TUNCURRY U3A INC	NSW	MORDIALLOC - CHELSEA U3A INC	VIC
HUNTER U3A INC	NSW	THIRD AGE LNG - WESTERN REGION	VIC
MACARTHUR U3A	NSW	THIRD AGE LEARNING CAULFIELD	VIC
PORT STEPHENS U3A	NSW	THIRD AGE RINGWOOD INC	VIC
SHOALHAVEN U3A	NSW	U3A - BAIRNSDALE AND DISTRICT	VIC
SYDNEY U3A	NSW	U3A ALBURY - WODONGA	VIC
SYDNEY U3A (CENTRAL COAST)	NSW	U3A BENDIGO	VIC
SYDNEY U3A (EASTERN REGION)	NSW	U3A CASTLEMAINE INC	VIC
SYDNEY U3A (ENDEAVOUR)	NSW	U3A CHADSTONE INC	VIC
SYDNEY U3A (INNER CITY WEST)	NSW	U3A CITY OF MELBOURNE INC	VIC
SYDNEY U3A (NORTHERN REGION)	NSW	U3A DANDENONG INC	VIC
TAMWORTH 3RD AGE LEARNING	NSW	U3A DAREBIN INC	VIC
THE BATHURST U3A INC	NSW	U3A EMERALD INC	VIC
U3A - WOLLONGONG INC	NSW	U3A FERNTREE GULLY	VIC

U3A DUBBO CHAPTER INC	NSW	U3A HOBSONS BAY INC	VIC
U3A HAWKESBURY THIRD AGE	NSW	U3A HORSHAM & DISTRICT INC	VIC
U3A NORTHERN RIVERS (LISMORE)	NSW	U3A MACEDON RANGES	VIC
U3A PARRAMATTA	NSW	U3A MARYBOROUGH DISTRICTS	VIC
U3A - ARMIDALE INC	NSW	U3A MOORLEIGH INC	VIC
BRIBIE ISLAND U3A	QLD	U3A SALE INC	VIC
MARYBOROUGH U3A INC	QLD	U3A SOUTHERN PENINSULA INC	VIC
MONCRIEFF U3A N GOLD COAST	QLD	U3A SUNRAYSIA INC	VIC
NOOSA REGIONAL U3A INC	QLD	U3A WARRNAMBOOL INC	VIC
U3A BRISBANE	QLD	U3A WERRIBEE REGION INC	VIC
U3A BUNDABERG INC	QLD	WALMSLEY VILLAGE U3A	VIC
U3A CAIRNS INC	QLD	WANGARATTA U3A INC	VIC
U3A CAPRICORN COAST INC	QLD	WONTHAGGI U3A	VIC
U3A GOLDCOAST INC	QLD	YARRA VALLEY U3A INC	VIC
U3A HERVEY BAY INC	QLD	U3A ALBANY	WA
U3A IPSWICH	QLD	U3A UNI OF W AUSTRALIA INC	WA
U3A MACKAY INC	QLD	WEST AUSTRALIAN REGIONAL U3A	WA
U3A PINE RIVERS CAMPUS INC	QLD		
U3A REDCLIFFE INC	QLD		
U3A ROCKHAMPTON INC	QLD		
U3A SUNSHINE COAST	QLD		
U3A TOWNSVILLE INC	QLD		

NB: Some U3A names have been abbreviated to save space

U3A QUESTIONNAIRE

U3A NAME

CONTACT NAME AND PHONE NUMBER

Name:

Home Phone: (.....) .....
Area Code Number

Office Use Only

Rick Swindell
Ken Vassella
Faculty of Education
Griffith University
(07) 3875 5831

I: Activities within your U3A

1) Teaching in your U3A

Record your best estimates and calculations in these boxes

"Core" activities (i.e. your main program)

1. How long is your **"teaching year"** in weeks? (Only count the number of weeks in which your main activity offerings are run - omit special or one-off activities, e.g. if you run for four terms, each of 10 weeks, enter 40 in the box.)		1.01
2. What is an average number of activities on offer during any **typical teaching week**? (e.g. in a typical teaching week your U3A might offer 13 activities. Enter 13 in the box.)		1.02
3. Estimate the total number of hours taught in a **typical teaching week**. (e.g. of the 13 activities estimated above, if 8 of these run for 1 hour, 4 run for 2 hours and 1 runs for 3 hours, enter 19 in the box)		1.03

"Occasional" activities

In the following box list details of activities run occasionally, but at least once a year, by U3A tutors. Count only the component of activities **provided by your tutors. Omit contributions by non-U3A members.**

Brief description of activity	Total hours	
e.g. *Annual 3 day botany camp/tramp in rainforest (12 hours with 3 U3A tutors)*	36	
e.g. *Dance group (6 times per year for 4 hours - 3 U3A organisers)*	72	
		1.04

If space is insufficient, please use the back of this page for additional information.

2) Administration in your U3A

In this section please enter details of specific administrative tasks. Here is an example for Management Committee meetings of a hypothetical group. Suppose a hypothetical U3A holds 8 Management Committee meetings per year, each lasting 2 hours on average, and there are 9 members on the Committee. Enter data as follows

Example - Management Committee Meetings

Number of meetings per year	8
Average duration of meetings (hours)	2
Number of Committee members	9

[For your information the data from this section will be used to estimate a "person hours per week" commitment to management within U3As in Australia and NZ.]

Please enter estimates (following the example) in these tables.

A. COMMITTEES

Management Committee

Number of meetings per year		1.05
Average duration of meetings (hours)		1.06
Number of Committee members		1.07

Social Committee

Number of meetings per year		1.08
Average duration of meetings (hours)		1.09
Number of Committee members		1.10

C. Newsletter/publications Committee

Number of meetings per year		1.11
Average duration of meetings		1.12
Number of Committee members		1.13

Other Committee(s) (Add the totals for each of these **other** committees and enter in the table below)

List the names of these other committees - _____

_____

Number of meetings per year		1.14
Average duration of meetings		1.15
Number of Committee members		1.16

Note
This table is only for information about **other** committees.

B. OFFICE STAFF

Number of hours office is staffed **per week**		1.17
Usual number of office workers **per hour**		1.18
Number of weeks **per year** office is staffed		1.19

C. ADDITIONAL ADMINISTRATIVE OR OTHER TASKS

In addition to the above committee tasks, members of Management Committee and other individuals spend many hours per week/month on other vital U3A activities. These activities maynot be carried out in a regular weekly or monthly routine. Therefore, it is difficult to "tightly" quantify these hours. In the following table please name and describe the task and estimate the person hours **per week**. Some of the "extras" you might consider could include: maintaining membership records; tutor liaison; arranging guest speakers and/or special activities; arranging teaching venues; publicity; computer labels; preparing the newsletter: and so forth.

Only include hours which have not been counted in the previous sections.

Name of task	Brief description of task	Person hours per week	Weeks per year
e.g. finance	*preparing reports, writing receipts, paying accounts,addressing envelopes*	17	
e.g. newsletter	*Typing, collating, telephoning*	14	

1.20

If space is insufficient please use the back of this page for additional information

II: Information and ideas from your Management Committee

1)How much is your annual membership fee?

Single	$
Joint (if applicable)	$

2.01

2) What was your largest membership in 1996?

2.02

3) What year did your U3A begin?

19 . .

2.03

4) Our U3As range in size from memberships of less than 100 to more than 3000. What maximum membership do you believe **your** U3A can accommodate under present conditions?

2.04

What factors would influence growth beyond this point?

2.05

5) What levels of support or in kind assistance etc do you currently receive or have recently received from persons/organisations external to your U3A, and from whom?

Type of service	Provider	One Off	Ongoing
e.g. Subsidised teaching space	City Council		X
e.g. Grant	Gaming fund	X	

2.06

6) List the three most important problems or difficulties which your management committee has to deal with. (List the most important first.)

	2.07
	2.08
	2.09

7) Imagine a future situation in which a government or adult education agency provided financial assistance or resources to assist adult education organisations.

Do you believe that assistance of this nature should be accepted by U3As? **Yes** **No** 2.10

If **yes** how might you use these resources in an attempt to resolve any of the three difficulties you listed in question 6?

	2.11

If **no,** give reasons.

	2.12

8) Given that the situation mentioned in 7 is unlikely to occur, would your committee consider raising membership fees to help address any of the difficulties identified in question 6?

Yes **No** (Tick one) 2.13

Please comment on your answer	2.14

9) What do you believe are the three greatest accomplishments of your U3A? (List the most important first.)

	2.15
	2.16
	2.17

10) Within the next five years what are the main things you would like your U3A to have accomplished?

2.18

If space is insufficient please use the back of this page for additional information

11) In an ideal world, where would you prefer the **majority** of your U3A activities to be held? (Tick one.)

Formal education settings such as in a university or college ☐ 2.19

Convenient locations within the community ☐ 2.20

It doesn't really matter? ☐ 2.21

12) Approximately what percentage of your activities are held in members' homes? ☐ % 2.22

13) Ideally, what types of emphasis should be placed on the majority of U3A activities? (Tick one)

They should be academic in nature ☐ 2.23

Almost any type of activity is suitable so long as it fits broadly within the U3A ideal of providing intellectually challenging pursuits. ☐

Some other option (Please describe) ☐

14) What kind of group leader/convenor/tutor is most appropriate for your U3A (Tick one box)

A person with prior teaching/tutoring background ☐ 1.24

Any member who has something to offer, regardless of prior background ☐

Some other (describe) ☐

15) How does your U3A monitor its activites and teaching? (Tick all appropriate boxes)

Feedback sought from participants and/or group leaders. ☐ 2.25

"Market forces" (e.g. if members don't like an activity or leader they leave and the class winds up without need for monitoring). ☐ 2.26

Some other way (describe - If space is insufficient please use the back of this page.) ☐ 2.27

16) How does your U3A presently cope with member requests for specialist activities involving expensive or scarce equipment e.g. computers, photography? 2.28

17) Imagine that a quality activity had been developed on (say) history, or creative writing, which could be offered by distance education methods (e.g. packages of notes, tapes, videos) to U3A members everywhere, with participants providing their input through letter, fax, electronic mail, and so on. If such offerings were available might your U3A support the idea? (Please tick one of the following 4 options and provide additional information as appropriate.)

2.29

Yes **No** **Maybe**

If **maybe** please comment

18) Does your U3A actively seek to attract new members? **Yes** **No**

2.30

If **yes**, how?

19) It may be of interest to see if any pattern exists regarding the backgrounds of people who fill major committee roles in U3As.

Please describe as accurately as possible the kinds of occupations held by current major office bearers immediately before their retirement (e.g. carpenter, business owner, accountant, home maker, etc.)

Office bearer	Former occupation	
President		2.31
V/President		2.32
Secretary		2.33
Treasurer		2.34
		2.35

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III: Possibilities for the future

The following are some U3A issues which may need to be considered in the future. Please indicate your feelings about these by circling the appropriate box.

(Circling SA means you strongly agree; A - agree; N - neutral; D - disagree; SD - strongly disagree.)

In the future, it may become more difficult to attract volunteer administrators who will spend the many hours needed to successfully run a U3A group.	SA A N D SD	3.01
In the future, some form of financial or "in-kind" payment might be paid to a U3A administrator who carries out the bulk of administration under the direction of a member-elected committee.	SA A N D SD	3.02
In the future, payment for some administrative services would undermine the self-help nature of U3As in Australasia.	SA A N D SD	3.03
In the future, U3As may play a wider community role by helping in libraries, art galleries, museums, and other places which would benefit from expert volunteers.	SA A N D SD	3.04
In the future, U3As should promote the use of members' skills to conduct or assist with research activities related to the wider Third Age population.	SA A N D SD	3.05
In the future, U3As should develop activities designed to attract third agers from groups which are currently under-represented in U3A membership.	SA A N D SD	3.06
In the future, U3As should design activities which use distance education methods to allow mentally alert frail elderly people and other isolated older people to participate in U3A.	SA A N D SD	3.07
In the future, U3As should pay academics or other highly trained people to run some specially designed U3A activities.	SA A N D SD	3.08
In the future, in order to meet the evolving needs of members, U3As will increasingly need to pay for the hire of specialist teaching facilities such as computer labs.	SA A N D SD	3.09

In the future, governments should be asked to provide funding to help U3As develop.	SA A N D SD	3.10
In the future, the technological demands on the Third Age population will increase.	SA A N D SD	3.11
In the future, early retirement or fewer jobs will result in younger retired people joining U3A.	SA A N D SD	3.12
In the future, things that interest U3A members will be quite different from those that interest many of today's members.	SA A N D SD	3.13
In the future, retired people will be expected to do more to support themselves.	SA A N D SD	3.14
In the future, U3A groups will communicate more freely with each other and share resources.	SA A N D SD	3.15
In the future, U3A groups will take part in wider educational activities such as educational travel, exchange visits and other activities distant from "home base".	SA A N D SD	3.16
In the future, it will be reasonable to ask U3A members to pay considerably more for their membership in order to support a higher level of service.	SA A N D SD	3.17
In the future, a centralised U3A "clearing house" for members, containing materials such as superseded distance education notes from universities, videos, computer manuals etc would be of value.	SA A N D SD	3.18
If you know of any other issues or solutions which might influence U3As of the future please enter them below. Feel free to add an additional page if the space below is insufficient.		3.19

Thank you for your time and patience in providing this information.

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